Oracle Taleo Enterprise
Scheduling Center Configuration Guide
Feature Pack 13B
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September 16, 2013
Taleo Scheduling Center Administrator Functions

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# Revision History

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<tr>
<th>Date</th>
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<th>Revised Topic</th>
</tr>
</thead>
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<tr>
<td>September 16, 2013</td>
<td>Initial publication.</td>
<td></td>
</tr>
</tbody>
</table>
Technical Configuration and Software Performance

For the latest information, refer to the *Taleo Enterprise Technical Configuration and Software Performance Guide* document for the applicable release.
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Overview

Taleo Scheduling Center

The Taleo Scheduling Center is a product used with Taleo Recruiting to handle automated and high volume scheduling of candidates.

This add-on scheduling functionality allows users to schedule any number of screening functions for candidates, including but not limited to:

- job fair or campus appointments
- mass recruitment events
- interviews

The Taleo Scheduling Center facilitates the scheduling of these functions through the creation and management of calendars, which are populated with timeslots, into which candidates can schedule appointments. The Taleo Scheduling Center sends follow-up invitations (triggered through the candidate selection workflow) and reminder emails and records status messages in the candidate file each time a candidate performs a scheduling activity. The Taleo Scheduling Center displays a calendar view for users showing the resulting timetables of which invites are scheduled for each time slot on each day. The Taleo Scheduling Center sends email messages to candidates requesting them to schedule an appointment. It also sends emails confirming appointments and reminding candidates about their scheduled appointments.

The Taleo Scheduling Center screening service is available in two types of integration:

- Self-service: This integration type is supplied with all applications. In this type, an initial invitation email is sent to the candidate. Emails sent at the different phases of the workflow are controlled through candidate permissions set at the calendar level. The employer (recruiter) is able to manage the appointments of a candidate only if the candidate has logged in to the Taleo Scheduling Center at least once.
- Proctored: This integration type is optional and must be activated by Oracle Support. In this type, no initial invitation email is sent to the candidate. Emails sent at the different phases of the workflow are controlled through candidate permissions set at the calendar level. The employer (recruiter) can manage the appointments of a candidate even if the candidate has not logged into the Taleo Scheduling Center.

Although two types of integrations exist for the Taleo Scheduling Center, both types are configured, activated and used the same way.
Login

Login and Product Access

When users open the Taleo Enterprise solution, the User Sign In page is displayed. Users must select the language in which they want to use the application. If users change the default language on the Sign In page, the page is displayed in the new language and subsequent Taleo product pages are presented in that language. After selecting a language, users can also instruct the system to “remember” their selection so that the next time they sign in, the User Sign In page will be presented in the language they selected.

If single sign-on (SSO) is not enabled within an organization, users must enter a user name and password on the User Sign In page before being able to see the list of Taleo products to which they have access. The user name and password are provided by system administrators. Users can modify their password.

Once a user’s credentials have been entered and accepted, the Welcome Center or table of contents page is displayed. The Taleo products available for use are dependent on which products were purchased by the organization and on the user’s user type and permissions.

Accessing a Taleo Application

**Prerequisite**
You must have received a user name and password from your system administrator.

**Steps**
1. Select the language in which you want to use the application.
2. Enter your user name and password.
3. Click Sign In.

Using the Forgot Password Link

**Prerequisite**
You must have a valid username and email address in your user profile.

**Steps**
1. ClickForgot Your Password?
2. Enter your username and email address.
3. Click OK.

**Result**
If the request comes from an authorized user, an email is sent to the supplied address with a code to access the application.

**Next Step**
You must click the link provided in the email, enter your username and access code, and provide a new password.
Welcome Center

The Welcome Center is a home page that is displayed to users immediately after they log in and provides "one-click" access to Taleo products.

The Welcome Center contains an auxiliary navigation bar, a core navigation bar, a Quick Access panel, and a Communications panel.

- The auxiliary navigation bar contains links to additional resources such as the online help and the Sign Out link.
- The core navigation bar is a set of tabs that provide direct links to Taleo products. A user might have a tab for any or all of the following products: Performance, Recruiting, Compensation, Analytics, Learn, and Configuration.
- The Quick Access panel provides an alternative "one-click" access to the same products available in the core navigation bar and also provides a selection of modules within products for example, Onboarding, Transitions.
- Finally, Taleo clients can create information of interest to all Taleo product users in the organization for display in the central communications panel. Alternatively, they can create distinct sets of information and associate an information set with a configuration profile.

If the Welcome Center is enabled, it replaces the table of contents page.
Navigation Bars

Auxiliary Navigation Bar

The auxiliary navigation bar, located at the top right of pages, provides users access to Home, About, and Sign Out links.

<table>
<thead>
<tr>
<th>Auxiliary Navigation Bar Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>If the Welcome Center is enabled and users click Home, they are returned to the Welcome Center. If the Welcome Center is not enabled and users click Home, they are returned to the Table of Contents page.</td>
</tr>
<tr>
<td>About</td>
<td>Provides information such as the version number and the build number.</td>
</tr>
<tr>
<td>Sign Out</td>
<td>Terminates the session and users are automatically signed out of all Taleo products.</td>
</tr>
</tbody>
</table>

Core Navigation Bar

The core navigation bar provides users access to the Scheduling Center, Reports, and Configuration tabs.

<table>
<thead>
<tr>
<th>Link</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scheduling Center</td>
<td>Gives users access to the Calendars page where they can create calendars and update existing ones.</td>
</tr>
<tr>
<td>Reports</td>
<td>Gives users access to a list of reports they can run:</td>
</tr>
<tr>
<td></td>
<td>• Roster Schedule</td>
</tr>
<tr>
<td></td>
<td>• Scheduled Appointments (visible to Administrators only)</td>
</tr>
<tr>
<td></td>
<td>• Appointment Summary Report (visible to Administrators only)</td>
</tr>
<tr>
<td></td>
<td>• Arrival Status Report (visible to Administrators only)</td>
</tr>
<tr>
<td>Configuration</td>
<td>Gives system administrators access to the following configuration features:</td>
</tr>
<tr>
<td></td>
<td>• Email Templates</td>
</tr>
<tr>
<td></td>
<td>• Locations</td>
</tr>
<tr>
<td></td>
<td>• Import Calendars</td>
</tr>
<tr>
<td></td>
<td>• Display Time Zones</td>
</tr>
<tr>
<td></td>
<td>• Display Languages</td>
</tr>
</tbody>
</table>
Scheduling Center Permissions

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Permissions for Performing Actions in Taleo Scheduling Center

Actions that users can perform in Taleo Scheduling Center are determined by a combination of user type permission and their calendar role on each calendar. This includes:

- **SmartOrg user type permissions assigned to the user.**
- **Calendar Role assigned to the user for each calendar.**

Additionally, candidates may be granted permissions for actions on specific calendars based on the **Candidate Self-service Level** set for that calendar.

User Types and Calendar Roles

<table>
<thead>
<tr>
<th>User Type</th>
<th>SmartOrg User Type Permission</th>
<th>Taleo Scheduling Center Privileges</th>
<th>Calendar Role Grant</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Scheduling Center Administrator</strong></td>
<td>Manage Scheduling Center</td>
<td>Create, Manage, and Edit all Calendars</td>
<td>Automatically is granted all Calendar Roles for all calendars.</td>
</tr>
<tr>
<td><strong>Scheduling Center User</strong></td>
<td>Access Scheduling Center</td>
<td>Access to Scheduling Center Only</td>
<td>Must be granted a Calendar Role to perform actions on calendars.</td>
</tr>
<tr>
<td><strong>Scheduling Center User</strong></td>
<td>Create Calendars and access Scheduling Center</td>
<td>Access to Scheduling Center, Create Calendars, Duplicating Self-Created Calendars</td>
<td>Automatically is granted the Calendar Owner Calendar Role for self-created calendars. Must be granted a Calendar Role to perform actions on other calendars.</td>
</tr>
<tr>
<td><strong>Candidate User</strong></td>
<td>None</td>
<td>None</td>
<td>Candidate Self-Service Level</td>
</tr>
</tbody>
</table>

Administrator User

The Administrator user has all permissions, for all calendars in the Taleo Scheduling Center.

The Administrator can create, manage, and edit all calendars. The Administrator can also assign ownership of a calendar or access to calendars to a user. The Administrator has all the permissions of the following calendar roles:

- Read-Only
- Mark Arrived/No Show
- Manage Timeslots
- Administer Calendars

The Administrator does not necessarily have administrator rights for the Taleo Recruiting Center.

The Administrator must be granted the Manage Scheduling Center user type permission in SmartOrg Administration at .
Scheduling Center User

The Scheduling Center user has access to the Taleo Scheduling Center.

Users can be granted one of the following two SmartOrg user type permissions:

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create calendars and access Scheduling Center</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Scheduling</td>
</tr>
<tr>
<td>Access Scheduling Center</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Scheduling</td>
</tr>
</tbody>
</table>

The Access Scheduling Center user type permission gives users access to the Taleo Scheduling Center. The functions users will be allowed to perform in the Taleo Scheduling Center will depend on the Calendar Role.

The Create calendars and access Scheduling Center user type permission gives users the ability to create calendars via the Add New Calendar button in the Taleo Scheduling Center. Users granted this permission will automatically be assigned the Calendar Owner role, although the creator does not have to be the owner. Users with this user type permission will still need to be assigned calendar roles for other calendars they do not own or create.

Users granted the Create calendars and access Scheduling Center user type permission can choose another Calendar Owner or remain the Calendar Owner. However, these users will always keep the Calendar Owner role allowing them to go back to the calendar after creation.

The Create calendars and access Scheduling Center user type permission should be used to grant users the ability to create calendars without granting full Scheduling Center configuration rights.

Granting Users Access to the Taleo Scheduling Center

**Prerequisite**

The Manage User Types and Access Administration user type permissions are required.

The user being granted access to the Taleo Scheduling Center must be active.

The administrator must know the user type assigned to the user.

*Configuration > [SmartOrg] Administration > [Users] User Types*

**Steps**

1. Select a user type.
2. In the Recruiting functional domain, click *Edit* next to Scheduling Center.
3. Select the desired permission: Access Scheduling Center OR Create calendars and access Scheduling Center.
4. Click *Save*.

**Next Step**

Users must try at least once, unsuccessfully, to sign in to the Taleo Scheduling Center. Only then will the Administrator be able to grant the user permissions for the Taleo Scheduling Center.
Calendar Role

A calendar role is the right of a user to perform a task in the Taleo Scheduling Center.

Calendar roles are granted to users by a Taleo Scheduling Center Administrator or by a user granted the Create calendars and access Scheduling Center user type permission when the calendar is created or by the Calendar Owner or an Administer Calendars user. The role a user is granted is for a specific calendar. Before a role can be granted to a user, the user must first be granted access to the Taleo Scheduling Center by a Recruiting Center system administrator. The users must try (but will not succeed) at least once to connect to the Scheduling Center for the administrator to be able to grant them a role. A user will only be able to successfully connect to the Scheduling Center once he/she has been granted a Calendar Role.

A Calendar Owner, an Administer Calendars, and an Administrator can grant the following types of Calendar Roles:

<table>
<thead>
<tr>
<th>Calendar Role Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Read-Only</td>
<td>A Read-Only user can only view information in the Taleo Scheduling Center. Information available is:</td>
</tr>
<tr>
<td></td>
<td>• calendars</td>
</tr>
<tr>
<td></td>
<td>• calendar roles</td>
</tr>
<tr>
<td></td>
<td>• timeslots</td>
</tr>
<tr>
<td></td>
<td>The Read-Only user can access the system to track candidate attendance to interviews.</td>
</tr>
<tr>
<td></td>
<td>A user is granted a Read-Only role by an Administrator, a Calendar Owner, or an Administer Calendars user in the Taleo Scheduling Center for a specific calendar.</td>
</tr>
<tr>
<td></td>
<td>The same user can have different roles for different calendars.</td>
</tr>
<tr>
<td>Mark Arrived/No Show</td>
<td>A Mark Arrived/No Show user can only indicate if a candidate has arrived or not for an appointment.</td>
</tr>
<tr>
<td></td>
<td>The Taleo Scheduling Center has a level of access which allows a user to read data in the system and to record whether candidates arrived for their appointments or were “no-shows.” These users may be greeters or reception desk workers who are employed by the recruiting company. A user that has been granted a Mark Arrived/No Show role has all the permissions of a read-only user and can also mark in the calendar if a candidate has arrived to an interview or if he/she did not show up.</td>
</tr>
<tr>
<td></td>
<td>A user is granted a Mark Arrived/No Show role by an Administrator, a Calendar Owner, or an Administer Calendars user in the Taleo Scheduling Center.</td>
</tr>
<tr>
<td></td>
<td>The same user can have different permissions for different calendars.</td>
</tr>
<tr>
<td>Schedule Appointments</td>
<td>A Schedule Appointments user can manage appointments and decline invitations on behalf of a candidate.</td>
</tr>
<tr>
<td></td>
<td>The Taleo Scheduling Center has a Schedule Appointments level of access which allows a user to:</td>
</tr>
<tr>
<td></td>
<td>• decline an invitation</td>
</tr>
<tr>
<td></td>
<td>• schedule an appointment on behalf of a candidate</td>
</tr>
<tr>
<td></td>
<td>• reschedule an appointment on behalf of a candidate</td>
</tr>
<tr>
<td>Calendar Role Type</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>• cancel an appointment on behalf of a candidate                                                                                             A user that has been granted a Schedule Appointments role has all the permissions of a Read-Only and Mark Arrived/No Show user. A user is granted a Schedule Appointments role by an Administrator, a Calendar Owner, or an Administer Calendars user in the Taleo Scheduling Center. To manage appointments on behalf of a candidate, the user granted a Schedule Appointments permission must have access to the Taleo Recruiting Center for a specific calendar. For the self-service integration type, to be able to manage appointments on behalf of a candidate, the candidate must first log in to Taleo Scheduling Center via the initial invitation email to activate communication between Taleo Scheduling Center and Taleo Recruiting Center. For the proctored integration type, the user can manage the appointments of the candidate, even if the candidate did not log into a Career Section. The same user can have different permissions for different calendars.</td>
</tr>
<tr>
<td></td>
<td>A user that has been granted a Schedule Appointments role has all the permissions of a Read-Only and Mark Arrived/No Show user. A user is granted a Schedule Appointments role by an Administrator, a Calendar Owner, or an Administer Calendars user in the Taleo Scheduling Center. To manage appointments on behalf of a candidate, the user granted a Schedule Appointments permission must have access to the Taleo Recruiting Center for a specific calendar. For the self-service integration type, to be able to manage appointments on behalf of a candidate, the candidate must first log in to Taleo Scheduling Center via the initial invitation email to activate communication between Taleo Scheduling Center and Taleo Recruiting Center. For the proctored integration type, the user can manage the appointments of the candidate, even if the candidate did not log into a Career Section. The same user can have different permissions for different calendars.</td>
</tr>
<tr>
<td>Manage Timeslots</td>
<td>A Manage Timeslots user can manage timeslots, days and the number of appointments available per timeslots. The Taleo Scheduling Center has a Manage Timeslots level of access which allows a user to: • lock and unlock days • delete timeslots in a calendar • set the number of appointments available per timeslots A user that has been granted a Manage Timeslots role has all the permissions of a Read-Only, Mark Arrived/No show and Schedule Appointments user. A user is granted a Manage Timeslots role by an Administrator, a Calendar Owner or an Administer Calendars user in the Taleo Scheduling Center. The same user can have different permissions for different calendars.</td>
</tr>
<tr>
<td>Administer Calendars</td>
<td>An Administer Calendars user has all permissions for a specific calendar. An Administer Calendars user has managing rights for a specific calendar, that is: • edit the calendar • manage timeslots • manage days • grant and revoke calendar roles to other users An Administer Calendars user cannot create calendars, revoke the rights of a Calendar Owner or of an Administrator. A user is granted the Administer Calendars role by an Administrator or a Calendar Owner in the Taleo Scheduling Center.</td>
</tr>
</tbody>
</table>

Ownership of a calendar can only be granted and revoked by a Taleo Scheduling Center Administrator. Roles are granted for a specific calendar.
Example:
A user may have a Read-Only calendar role for one calendar and an Administer Calendars role for another calendar.

Granting Users a Calendar Role

**Prerequisite**
The user being granted a Calendar role must have tried at least once to connect to the Scheduling Center, otherwise the name of the user will not appear in the user drop-down list.

A user type of Access Scheduling Center or Create Calendars and access Scheduling Center and a Calendar role grant users access to this feature.

**Steps**

1. Click *Scheduling Center*.
2. In the Calendars page, click *Modify* next to a calendar.
3. Click *Add/Modify Calendar Permissions*.
4. Click *Select User* to select the desired user.
5. Select a permission for the calendar, that is Read-Only, Mark Arrived/No Show, Schedule Appointments, Manage Timeslots, Administer Calendars.
6. Click *Create Permission*.

**Result**
The page displays the assigned Calendar roles, with the role newly created included in the listing.

Editing the Permission of a Calendar Role

**Prerequisite**
A user type permission and a Calendar role grant users access to this feature.

**Steps**

1. Click *Scheduling Center*.
2. In the Calendars page, click *Modify* next to a calendar.
3. Click *Add/Modify Calendar Permissions*.
4. Click *Select User* to select the desired user.
5. Select a new permission for the calendar, that is Read-Only, Mark Arrived/No Show, Schedule Appointments, Manage Timeslots, Administer Calendars.
6. Click *Create Permission*.

**Result**
The newly assigned permission appears in the page.

Removing a Calendar Role

**Prerequisite**
A user type permission and a Calendar role grant users access to this feature.
**Steps**

1. Click *Scheduling Center*.
2. In the Calendars page, click *Modify* next to a calendar.
3. Click *Add/Modify Calendar Permissions*.
4. Click *Remove* next to the user you wish to remove.
5. Click *Yes* to confirm that you want to remove the calendar role.

**Result**

The page refreshes and the deleted user is removed from the listing.

---

**Candidate Self-Service Level**

The candidate permission set for the calendar determines what candidates will be able to perform when signing in to the Taleo Scheduling Center.

During a requisition process, a candidate can receive an invitation to book an appointment. Candidates can access the Taleo Scheduling Center only if they have received an email with an invitation to book an appointment. Depending on the permission set for the calendar, candidates can perform several functions such as book an appointment, schedule later or decide they are no longer interested.

A Taleo Scheduling Center Administrator can set for a calendar the access level candidates will have when accessing the Taleo Scheduling Center. Permissions are linked to the calendar, not to the candidate. When a candidate signs in to the Taleo Scheduling Center, the candidate is granted the permission level set for the calendar being used to manage appointments.

There are three levels of candidate permission an Administrator can set for a calendar:

- **Full**: When signing into the Taleo Scheduling Center, the candidate will be able to fully manage his/her appointments that is, cancel, reschedule, book, decline.
- **None**: For the self-service integration type, the candidate will only receive an initial invitation. When signing into the Taleo Scheduling Center, the candidate will only be able to view his/her pending invitations. Users will be unable to manage appointments. For the proctored integration type, no invitation email is sent to the candidate. The user with a Schedule Appointments, Administer Calendars, Calendar Owner or Administrator role will need to manage candidate appointments. The candidate will receive a reminder email confirming the appointment booked by the user.
- **Only Cancel Appointments**: When signing into the Taleo Scheduling Center, the candidate will only be able to cancel his/her appointments. The user with a Schedule Appointments, Administer Calendars, Calendar Owner or Administrator role will need to manage candidate appointments.

---

**Setting Candidate Permissions**

To determine if candidates are allowed to manage or not their appointments, the candidate permission must be set for the calendar.

**Prerequisite**

If creating the calendar, the user must be an Administrator or a Create Calendar user type.

If the calendar is already created, the user must have an Administer Calendar role or be the Calendar Owner.

**Steps**

1. In the Calendars page, click *Modify* next to the name of a Calendar.
2. In the Update Calendar page, from the drop down list located next to the Candidate Self Service Level field, select the access level permission for candidates.
3. Click *Update*.

**Result**

Depending on the type of permission set for the calendar, reminder e-mails sent to candidates will include or not an active link to access the Taleo Scheduling Center.
Taleo Scheduling Center Configuration

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Configuring Taleo Scheduling Center in Recruiting Administration

The following steps are required to configure the Taleo Scheduling Center as a service in Taleo Recruiting Administration.

Phases must be configured before the Taleo Scheduling Center Screening Service can be configured.

All steps must be completed for both the Taleo Scheduling Center screening service and the Taleo Scheduling Center (Proctored) service.

1. Activating the Taleo Scheduling Center Screening Service.
2. Configuring Taleo Scheduling Center Screening Service Settings.
3. Configuring Taleo Scheduling Center Input Fields.
4. Configuring Taleo Scheduling Center Results Fields.
5. Configuring Taleo Scheduling Center Screening Service User-defined Forms.
6. Configuring Taleo Scheduling Center Screening Service Labels.
7. Adding the screening service to a Candidate Selection Workflow.
8. Selecting a Message Template for the Taleo Scheduling Center Screening Service.

Activating the Taleo Scheduling Center Screening Service

**Prerequisite**

The Access Screening Services configuration and the Access Administration user type permissions are required.

The Taleo Scheduling Center and the Taleo Scheduling Center (Proctored) services have been created.

The screening service must be inactive.

**Configuration > [Recruiting] Administration > Screening Services**

**Steps**

1. Click **Taleo Scheduling Center** service name.
2. Click **Activate** located next to the name of the service.
3. Click the Taleo Scheduling Center (Proctored) service name.
4. Click **Activate** located next to the name of the service.

**Result**

The service is available in the Recruiting Center when users request an external service.

**Next Step**

Activating the Taleo Scheduling Center (Proctored) screening service.

Configuring Taleo Scheduling Center Screening Service Settings

**Prerequisite**

The Access Administration user type permission is required.

**Configuration > [Recruiting] Administration > Screening Services**

**Steps**

1. Click **Taleo Scheduling Center**.
2. Click *Edit* next to Properties.
3. In the Settings section, configure the assessment settings as desired. For details, see *Taleo Scheduling Center Screening Service Properties, Settings, and Fields*.
4. Click *Save*.

Next Step
Configuring Screening Service Settings for Taleo Scheduling Center (Proctored).

### Configuring Taleo Scheduling Center Input Fields

**Prerequisite**
The Access Administration user type permission is required.

*Configuration > [Recruiting] Administration > Screening Services*

**Steps**
1. Click *Taleo Scheduling Center*.
2. Click the name of an Input field.
3. Click *Edit* next to Properties.
4. Under Name, enter the name of the field if you want to override the default name.
5. Under Default Value, select the calendar that will appear by default in the calendar field located in the requisition Screening block. For details, see *Taleo Scheduling Center Screening Service Properties, Settings, and Fields*.
6. Click *Save*.

Next Step
Configuring Input Fields for Taleo Scheduling Center (Proctored).

### Configuring Taleo Scheduling Center Result Fields

**Prerequisite**
The Access Administration user type permission is required.

*Configuration > [Recruiting] Administration > Screening Services*

**Steps**
1. Click *Taleo Scheduling Center*.
2. Click the name of a Result field.
3. Click *Edit* next to Properties.
4. Under Name, enter the name of the field if you want to override the default name.
5. Click *Save*.

Next Step
Configuring Result Fields for Taleo Scheduling Center (Proctored).

### Configuring Taleo Scheduling Center Screening Service User-defined Forms

**Prerequisite**
The Access Administration user type permission is required.
Steps
1. Click Taleo Scheduling Center.
2. Under User-defined Forms, configure the following elements.
   - Capture of input fields: This is where you define how the Taleo Scheduling Center field (input field) will appear in the requisition file in Edit mode. You can define elements such as the field type (dropdown list, radio button) and if the field is mandatory.
   - Display of input fields: This is where you define how the Taleo Scheduling Center field (input field) will appear in the requisition file in View mode. You can define elements such as the field type (dropdown list, radio button) and if the field is mandatory.
   - Display of result fields: This is where you define how the Taleo Scheduling Center result fields will appear in the candidate submission.
   - Display of result set fields: This is used only for those external partners whose certification includes result set fields. Taleo Scheduling Center does not use this kind of fields. Therefore, nothing to configure here.
3. Click Save.

Next Step
Configuring User-defined Forms for Taleo Scheduling Center (Proctored).

Previewing a Screening Service User-defined Form

Prerequisite
The Access Screening Services configuration and the Access Administration user type permissions are required.

Steps
1. Click a screening service.
2. Click Preview this form located beside the form you want to preview.

Result
The final layout of a user-defined form used in a screening service is displayed to the system administrator.

Configuring Taleo Scheduling Center Screening Service Labels

Prerequisite
The Access Administration user type permission is required.

Steps
1. Click Taleo Scheduling Center.
2. Click Edit next to Labels.
3. Select the language of the message.
4. Complete the fields as desired. For details, see Taleo Scheduling Center Screening Service Properties, Settings, and Fields.
5. Click Save.
6. Click Preview next to Labels to see how the message will appear to candidates.
Previewing a Service Label

Prerequisite
The Access Screening Services configuration and the Access Administration user type permissions are required.

Configuration > [Recruiting] Administration > Screening Services

Steps
1. Click on the name of the service.
2. Click Preview next to Labels.

Result
The labels will be displayed as the candidate will see them.

Configuring the Taleo Scheduling Center Candidate Selection Workflow

Prerequisite
The Access Administration user type permission is required.

Configuration > [Recruiting] Administration > Screening Services

Steps
1. Click Taleo Scheduling Center.
2. Click Create next to CSW Actions.
3. Complete the fields as desired. For details, see Assessment CSW Actions.
4. Click Save.

Result
When the candidate selection workflow is used in the Recruiting Center, the execution of the Taleo Assessment will be carried out automatically.

Next Step
Configuring Candidate Selection Workflow for Taleo Scheduling Center (Proctored).

Selecting Message Templates for the Taleo Scheduling Center

Prerequisite
The Access Administration user type permission is required.

Configuration > [Recruiting] Administration > Screening Services

Steps
1. Click Taleo Scheduling Center.
2. Click Edit next to Correspondence.
3. Click Select under Message template (internal candidates).
4. Select the message template you want to send to internal candidates.
5. Click Select.
6. Click Select under Message template (external candidates).
7. Select the message template you want to send to external candidates.
8. Click Select.
9. Click Save.

Result
The candidate will receive an e-mail based on these templates, depending on whether the candidate is an internal or external candidate. The e-mail will contain a link to an appointment invitation.

Next Step
Configuring Message Templates for Taleo Scheduling Center (Proctored).

### Taleo Scheduling Center Screening Service Properties, Settings, and Fields

<table>
<thead>
<tr>
<th>Taleo Scheduling Center Screening Service Property</th>
<th>Description</th>
<th>Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Value: Taleo Scheduling Center or Taleo Scheduling Center (Proctored)</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; Properties &gt; Edit</td>
</tr>
<tr>
<td>Description</td>
<td>Value: The Taleo Scheduling Center automatically schedules candidates you designate on calendars you can control.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; Properties &gt; Edit</td>
</tr>
<tr>
<td>Provider Name</td>
<td>Taleo</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; Properties &gt; Edit</td>
</tr>
<tr>
<td>Provider Description</td>
<td>Taleo</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; Properties &gt; Edit</td>
</tr>
<tr>
<td>Type</td>
<td>Scheduling Center</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; Properties &gt; Edit</td>
</tr>
<tr>
<td>Status</td>
<td>Possible values are Active, Inactive.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; Properties &gt; Edit</td>
</tr>
<tr>
<td>Code</td>
<td>Code given to Taleo Scheduling Center.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; Properties &gt; Edit</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Taleo Scheduling Center Screening Service Setting</th>
<th>Description</th>
<th>Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>Validity Period</td>
<td>Value: Always valid</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services</td>
</tr>
</tbody>
</table>
### Taleo Scheduling Center Screening Service Setting

<table>
<thead>
<tr>
<th>Description</th>
<th>Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidate must answer email within (in hours)</td>
<td>&gt; Taleo Scheduling Center &gt; [Properties] &gt; Edit</td>
</tr>
<tr>
<td>Value: 0</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; [Properties] &gt; Edit</td>
</tr>
<tr>
<td>This setting is not used by Taleo Scheduling Center.</td>
<td></td>
</tr>
<tr>
<td>This service is mandatory for new requisitions and for those updated while in &quot;Draft&quot; status</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; [Properties] &gt; Edit</td>
</tr>
<tr>
<td>Provided pop-up calendar delivery is used, this setting directs the browser to ignore the latest defined pop-up size and instead present the Taleo Scheduling Center in full-screen mode.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; [Properties] &gt; Edit</td>
</tr>
<tr>
<td>Access this service through the browser full-screen mode</td>
<td></td>
</tr>
<tr>
<td>Client Identifier</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; [Properties] &gt; Edit</td>
</tr>
<tr>
<td>Client ID is assigned when Taleo Scheduling Center is created.</td>
<td></td>
</tr>
<tr>
<td>Delay to wait before timing out a request (in hours)</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; [Properties] &gt; Edit</td>
</tr>
<tr>
<td>When a request times out the system will no longer try to receive a candidate appointment.</td>
<td></td>
</tr>
</tbody>
</table>

### Taleo Scheduling Center Screening Service Input Field Property

<table>
<thead>
<tr>
<th>Description</th>
<th>Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>AssessmentID</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; Input Fields &gt; Version [Properties] &gt; Edit</td>
</tr>
<tr>
<td>The calendar associated with the initial interview phase of the CSW.</td>
<td></td>
</tr>
<tr>
<td>The properties of the input field are:</td>
<td></td>
</tr>
<tr>
<td>• Code: The internal name of the input field. The code is a read-only property.</td>
<td></td>
</tr>
<tr>
<td>• Name: The label of the field in the requisition file. For example, Calendar ID 1.</td>
<td></td>
</tr>
<tr>
<td>• Domain: The type of field. The domain is a read-only property.</td>
<td></td>
</tr>
<tr>
<td>• Mandatory: If the service definition specifies the field as being mandatory, then the input field will always be mandatory. If the service definition specifies the field as optional, then you can configure the field as being either mandatory or optional. For example, if the input field is mandatory, then in the Recruiting Center, the Assessment Version field in the requisition file Screening block will have a red</td>
<td></td>
</tr>
</tbody>
</table>
### Taleo Scheduling Center Screening Service Input Field Property

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
<th>Path</th>
</tr>
</thead>
</table>
| asterisk to indicate that the field must be completed.  
- Default Value: Calendar displayed by default in the requisition file. |
| **AssessementId2-AssessementId10** | The calendar associated with the interview phases of the CSW, after the initial phase.  
The properties of the input field are:  
- **Code**: The internal name of the input field. The code is a read-only property.  
- **Name**: The label of the field in the requisition file. For example, Calendar ID 1.  
- **Domain**: The type of field. The domain is a read-only property.  
- **Mandatory**: If the service definition specifies the field as being mandatory, then the input field will always be mandatory. If the service definition specifies the field as optional, then you can configure the field as being either mandatory or optional. For example, if the input field is mandatory, then in the Recruiting Center, the Assessment Version field in the requisition file Screening block will have a red asterisk to indicate that the field must be completed.  
- **Default Value**: Calendar displayed by default in the requisition file. | Configuration > [Recruiting] Administration > Screening Services > Taleo Scheduling Center > Input Fields > Version [Properties] > Edit |

---

### Taleo Scheduling Center Screening Service Result Field

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Path</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Appointment</strong></td>
<td>The status of the first phase appointment. The Recruiting administrator can change the name of the label of the field.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; Result Fields &gt; Appointment</td>
</tr>
<tr>
<td><strong>AppointmentStatus2-10</strong></td>
<td>The status of an appointment possibly in phase 2 through 10. The Recruiting administrator can change the name of the label of the field.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; Result Fields &gt; AppointmentStatus1-10</td>
</tr>
<tr>
<td><strong>DetailsUrl</strong></td>
<td>Appears as the More Details link by default. The Recruiting administrator can change the name of the link by editing the Name field.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; Result Fields &gt; DetailsUrl</td>
</tr>
<tr>
<td><strong>SchedulingError</strong></td>
<td>The value, Taleo Scheduling Center returned an error, will appear if there is a communication error between</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services</td>
</tr>
<tr>
<td>Taleo Scheduling Center Screening Service Result Field</td>
<td>Description</td>
<td>Path</td>
</tr>
<tr>
<td>------------------------------------------------------</td>
<td>-------------</td>
<td>------</td>
</tr>
<tr>
<td>SchedulingError</td>
<td>Recruiting and Taleo Scheduling Center. If the error pertains to an error within Taleo Scheduling Center, a code will follow the text. The Recruiting administrator can change the name of the label of the field.</td>
<td>&gt; Taleo Scheduling Center &gt; Result Fields &gt; SchedulingError</td>
</tr>
<tr>
<td>SchedulingStatus</td>
<td>The status of scheduling the appointment. The Recruiting administrator can change the name of the label of the field.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; Result Fields &gt; SchedulingStatus</td>
</tr>
<tr>
<td>SchedulingNoShowStatus</td>
<td>The value of this field is displayed in the Results Summary in the Screening tab of the Job Submission.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; Result Fields &gt; SchedulingNoShowStatus</td>
</tr>
<tr>
<td>Summary</td>
<td>The Recruiting administrator can change the name of the label of the field.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; Result Fields &gt; Summary</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Taleo Scheduling Center Screening Service User-Defined Form</th>
<th>Description</th>
<th>Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capture of input fields</td>
<td>This is where you define how the Scheduling Center field (input field) will appear in the requisition file in Edit mode. You can define elements such as the field type (drop-down list, radio button) and if the field is mandatory.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; User-defined Forms</td>
</tr>
<tr>
<td>Display of input fields</td>
<td>This is where you define how the Scheduling Center field (input field) will appear in the requisition file in View mode. You can define elements such as the field type (drop-down list, radio button) and if the field is mandatory.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; User-defined Forms</td>
</tr>
<tr>
<td>Display of result fields</td>
<td>This is where you define how the Scheduling Center result fields will appear in the candidate submission.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; User-defined Forms</td>
</tr>
<tr>
<td>Display of result set fields</td>
<td>This is used only for those external partners whose certification includes result set fields. Taleo Scheduling Center does not use these kinds of fields. Therefore, nothing to configure here.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; User-defined Forms</td>
</tr>
<tr>
<td>Taleo Scheduling Center Screening Service Label</td>
<td>Description</td>
<td>Path</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>-------------</td>
<td>------</td>
</tr>
<tr>
<td>Service Name</td>
<td>This is the name of the service. Default value: Select an Interview Schedule</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; Labels</td>
</tr>
<tr>
<td>Label 1</td>
<td>Default value: Our initial review indicates that you may be qualified for this position. Additional information could facilitate your selection. This information will allow us to rank you with regard to other candidates as part of our total assessment process.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; Labels</td>
</tr>
<tr>
<td>Label 2</td>
<td>Default value: Therefore, we invite you to fill out an online assessment questionnaire. This process occurs in another window. You must answer all questions in a page before clicking Next. If you don't know the answer to a question, select the option that makes more sense to you.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; Labels</td>
</tr>
<tr>
<td>Label Before Link to Service</td>
<td>Default value: Do not use the browser's Back or Forward buttons to view previous or following questions. If you do so, you will lose all the information you have entered.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; Labels</td>
</tr>
<tr>
<td>Link to Service</td>
<td>Default value: Schedule an Appointment</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; Labels</td>
</tr>
<tr>
<td>Tooltip for Link to Service</td>
<td>Default value: Access the assessment questionnaire</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; Labels</td>
</tr>
<tr>
<td>Label 3</td>
<td>Default value: After completing the questionnaire, you will automatically return to this page.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; Labels</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Taleo Scheduling Center Screening Service CSW Action</th>
<th>Description</th>
<th>Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workflow</td>
<td>The action will take place when a candidate uses the specified workflow.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; CSW Actions</td>
</tr>
<tr>
<td>Step</td>
<td>The action will take place when the specified step is reached or later if the status criteria are not yet met.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; CSW Actions</td>
</tr>
</tbody>
</table>
### Taleo Scheduling Center Screening Service CSW Action

<table>
<thead>
<tr>
<th>Description</th>
<th>Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>The candidate must have this status when he or she reaches the selected step or the action will not take place until this status is reached.</td>
</tr>
<tr>
<td>Action</td>
<td>Send Online Screening Assessment</td>
</tr>
<tr>
<td>Phase</td>
<td>The phase is used with the candidate selection workflow (CSW). If a certain step/status is reached in the CSW, then the system can send out a Phase request to the partner (like perform additional assessment for the candidate after the candidate reached a certain step in the CSW). Phases are not used with Taleo Assessment.</td>
</tr>
</tbody>
</table>

### Taleo Scheduling Center Screening Service Correspondence

<table>
<thead>
<tr>
<th>Description</th>
<th>Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message template (internal candidate)</td>
<td>Message templates are used either when the recruiter manually requests an appointment invitation for a candidate, or when a candidate decides on the Career Section to receive an email with a link to the scheduling service. A message template is selected for internal candidates.</td>
</tr>
<tr>
<td>Message template (external candidate)</td>
<td>Message templates are used either when the recruiter manually requests an appointment invitation for a candidate, or when a candidate decides on the Career Section to receive an email with a link to the scheduling service. A message template is selected for external candidates.</td>
</tr>
</tbody>
</table>
Configuring Taleo Scheduling Center in Career Section Administration

The configuration of Taleo Scheduling Center in Career Section Administration consists of the following steps.
1. *Adding the Screening Block in the Career Section.*
2. *Configuring the Screening Block in the Career Section.*

Adding the Screening Block in the Career Section Application Flow

**Prerequisite**
The Access the Career Section administration section user type permission is required.
The application flow must be inactive.

/configuration > [Career Section] Administration > Application Flows

**Steps**
1. Click an application flow.
2. Click *Edit*.
3. Enter the name of the Screening section in the Add a Page field.
4. Click *Create a Page*.
5. Select the Screening block in the Available Blocks section and drag it to the Screening section you created.
6. Click *Save*.

Next Step
Configuring the Screening block.

Configuring the Screening Block in the Career Section Application Flow

**Prerequisite**
The Access the Career Section administration section user type permission is required.
The application flow must be inactive.

/configuration > [Career Section] Administration > Application Flows

**Steps**
1. Click the application flow containing a Screening block.
2. In the Application Flow Properties page, under Page Ordering, click the Screening link.
3. Click *Edit* next to Properties.
4. Complete the fields. For details, see *Screening Block Properties*.
5. Click *Save*.

Next Step
Activating the application flow.
# Career Section Screening Block Properties

<table>
<thead>
<tr>
<th>Screening Block Property</th>
<th>Description</th>
<th>Value</th>
<th>Location</th>
</tr>
</thead>
</table>
| Allow candidates to receive questionnaire information later by email | • Yes  
• No | | Configuration > [Career Section] Administration > Application Flows > Click an application flow > Screening link > Edit |
| Show this block to the following candidates | • ACE Candidates  
• Those who Meet RMI Criteria  
• Those who Meet Required Criteria  
• All Candidates | | Configuration > [Career Section] Administration > Application Flows > Click an application flow > Screening link > Edit |
| Display Mode | The assessment can be delivered in a separate window (pop-up) or in the same window (inline) of the Career Section. | • Pop-up Window  
• Inline | Configuration > [Career Section] Administration > Application Flows > Click an application flow > Screening link > Edit |
| This service is mandatory (candidates must click the link to access the questionnaire immediately or choose to receive it by email, if the latter is activated. | • Yes  
• No | | Configuration > [Career Section] Administration > Application Flows > Click an application flow > Screening link > Edit |
| Service | The services available to the zone. | No | Configuration > [Career Section] Administration > Application Flows > Click an application flow > Screening link > Edit |
Configuring Phases

Phases

A phase is an Administrator configured point in the hiring process where an invitation to book an appointment is sent to a Candidate.

The Phase allows the Recruiting Center Administrator to associate the Workflow, Step and Status that will trigger a follow-up appointment and further configure which appointment invitation will be distributed. A requisition can include up to 10 phases. However, to avoid confusion it is recommended to use only 2 or 3 phases per requisition. The appropriate invitation will be automatically distributed based on the Calendar ID association selected by the Recruiter in the Screening tab.

Phases must be configured before the Taleo Scheduling Center Screening Service is configured.

Creating a Phase

Prerequisite

The Access Administration user type permission grants users access to this feature.

Phases must be created

Steps

1. In the Custom tab, click the elements link located on the same row as TSC_Follow-Up-appointments.
2. In the Selection Element Link page, select New.
3. In the Selection Element Editor dialog box, complete the fields.
4. Click Done.

Result

A new phase is now available in the CSW Actions section of the screening service.

Next Step

Adding an invitation phase to a requisition.

Editing a Phase

An administrator user can edit the name of an existing phase.

Prerequisite

The Access Administration user type permissions grants users access to this feature.

A phase must be created in the Recruiting Administration.

Steps

1. In the Custom tab, click the Elements link located on the same line as TSC_Follow-Up-appointments.
2. In the Selection Element List, select an existing appointment phase.
3. In the Selection Element Editor dialog box, complete the fields.
4. Click Done.

Result
The selected phase is now edited and remains available in the CSW Actions section of the screening service.

Activating a Phase
To add a phase to a workflow, the phase must first be activated in the recruiting.

Prerequisite
The Access Administration user type permissions grants users access to this feature.
Configuration > [Recruiting] Administration > Selections > Large Selections

Steps
1. In the Custom tab, click the Elements link located on the same row as TSC_Follow-Up-appointments.
2. In the Selection Element List, click on a phase.
3. In the Selection Element Editor window, choose the radio button to activate the phase.
4. Click Done.

Result
The phase is now activated in the drop down list under phases, in the CSW Action section of the screening service.

Inactivating a Phase
A phase cannot be added to a workflow if it is inactivated in the Recruiting Center.

Prerequisite
The Access Administration user type permission grants users access to this feature.
Configuration > [Recruiting] Administration > Selections > Large Selections

Steps
1. In the Custom tab, click the Elements link located on the same row as TSC_Follow-Up-appointments.
2. In the Selection Element List, click on a phase.
3. In the Selection Element Editor window, choose the radio button to inactivate the phase.
4. Click Done.

Result
The phase is now inactivated in the drop down list under phases, in the CSW Action section of the screening services.

Adding an Invitation Phase to the CSW
During the requisition process, invitations can be sent to candidates at different points of the hiring process.

Prerequisite
The Access Administration user type permission grants users access to this feature.
To be able to send multiple invitations to a candidate for the same requisition, the requisition must be created and phases must be created and activated.

*Configuration > [Recruiting] Administration > Screening Services*

**Steps**

1. In the Screening Services list, select Taleo Scheduling Center.
2. Click *Create* next to CSW Actions.
3. In the Action drop-down list, select *Trigger a follow-Up Appointment*.
4. From the Phase drop-down list, select the phase previously configured for which you wish to send an invitation.
5. Click *Add*.
6. Click *Done*.

**Result**

An invitation will be sent to the candidate at the selected phase of requisitions using this workflow.

---

**Removing an Invitation Phase from the CSW**

Invitation phases can be removed from the requisition process.

**Prerequisite**

The Access Administration user type permission grants users access to this feature.

To be able to remove an invitation from a requisition, the requisition must be created and phases must be activated.

*Configuration > [Recruiting] Administration > Screening Services*

**Steps**

1. In the Screening Services list, select a screening service.
2. In the CSW Actions section, click *Remove* next to the appropriate Candidate selection workflow.

**Result**

The invitation phase is removed from the workflow.
Configuring Calendars

Calendar
A calendar is the graphical representation of time from which candidates can choose a date to book an appointment.

A calendar is created in Taleo Scheduling Center to allow candidates to choose a date to book an appointment for an interview that will be carried out either in person or by phone.

Only an Administrator or a user with the Create calendars and access Scheduling Center user type permission can create a calendar.

Benefits
- Provides the ability for an Administrator, Manage Timeslots, Administer Calendars or a Calendar Owner role to choose the dates for which a candidate can book appointments.
- Provides the ability for an Administrator to choose a calendar from several calendars when assigning phases in a requisition process.

Adding a Calendar to the Calendar List

Prerequisite
The user must have administrator rights to the Taleo Recruiting Center.

The user must know the calendar ID number given when the calendar is created in the Taleo Scheduling Center.

Configuration > [Recruiting] Selection List

Steps
1. Click the Large Selections tab.
2. In the Custom tab, locate the entry Scheduling-Center-Calendar-Id and click on the number located in the Number of Elements column for this row.
3. In the Selection Element List page, click New.
4. In the Selection Element Editor page, complete the fields.
   Calendar ID field must exactly match what is configured in Taleo Scheduling Center.
5. Select another language in the language drop-down list and translate the name in the selected language.
6. Repeat the translation process for each language of the list.
7. Click Done.

Result
The selected calendar appears in the calendar list of the Taleo Recruiting Center and can be assigned to a requisition.

Removing a Calendar from the Calendar List

Prerequisite
The user must have administrator rights for the Taleo Recruiting Center to perform this task.
Configuration > [Recruiting] Selection List

Steps

1. Click the Large Selections tab.
2. In the Custom tab, find the entry for Scheduling-Center-Calendar-Id and click on the number of Number of Elements for this row...
3. In the Calendar List, click the check box of the calendar name you wish to delete.
4. Click the trash can icon.

Result
The calendar no longer appears in the calendar list of Taleo Recruiting Center and it is not possible to assign the calendar to a requisition.
Configuring Invitations

Sending an Invitation Automatically during the Workflow

System administrators can automatically trigger Passport screening services such as Scheduling Center when a candidate reaches a certain step or status within a candidate selection workflow. Triggering automatically an invitation during the workflow process can be used to send an invitation to several candidates at a time, by changing the status of the candidate to a determined step or status triggering the invitation.

**Prerequisite**

The Taleo Scheduling Center screening service must be configured.

The Access Administration and Access Screening Services configuration user type permissions are required.

Configuration > [Recruiting] Administration > Screening Services

**Steps**

1. In the Screening Services List, select the required integration type of Taleo Scheduling Center.
2. Click Create next to CSW Action.
3. In the New Candidate Selection Workflow Action page, select the workflow, step and status combination that will automatically trigger the screening service. The workflows, steps and statuses available are the ones configured in the Taleo zone.
4. In the Action drop-down list, select Send Scheduling Center Invitation or Trigger a follow-up appointment. The Scheduling Center invitation will automatically send the correspondence identified in the Message Template section of the Screening Service settings.
   - Selecting Send Scheduling Center Invitation will automatically send the correspondence identified in the Message Template section of the Screening Service settings. The message originates from the Correspondence Manager in Taleo Recruiting.
   - Selecting Trigger a follow-up appointment will automatically notify Scheduling Center to send out the email request. The email sent is controlled by the email configuration located in Taleo Scheduling Center.
5. Click Save.
6. Click Done.

**Result**

An invitation is automatically sent to the candidate at the selected step of the requisition.

Sending an Invitation Automatically during Candidate Application

A Taleo Recruiting system administrator can automatically invite candidates to schedule an appointment by adding a Screening block in the application selection process.

**Prerequisite**

The Access Administration user type permission is required.

Configuration > [Recruiting] Administration > Candidate Selection Workflow

**Steps**

1. Select the Steps tab.
2. Click an existing step or click New to create a new step.
3. On the Statuses Usage page, click Add... to add new statuses.
4. In the Add Status page, select the status you have just added.
5. Click Add.
6. Select a Step Progression Level.
7. Click Add.
8. On the Automatic Progression of Applications page, click Allow candidates to reach this status automatically when the (optional) conditions specified below are met.
9. In the Conditions section, select an existing condition, or click Create Condition.
10. Complete the fields as required.
11. In the Workflows list, select an existing workflow, or click New to create a new one.
12. Complete the fields as required.
13. In Steps Usage, click Add to add a screening step, or click New to create a new one.

Result
An invitation is automatically sent to the candidate applying on a Career Section.
Taleo Scheduling Center Administrator Functions

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Candidate Portal Messaging

Configurable Candidate Portal Messaging
Taleo Scheduling Center administrators can create custom text in the Candidate Portal.
The Candidate Portal utilizes message templates allowing Scheduling Center administrators to override default
text with custom messages. The Configuration page displays a Candidate Portal Messaging link which launches
the Message Templates page containing links to the Candidate Portal message templates.
The templates contain default text that can be overridden for each specific locale. Both the header text and the
body of the message are configurable.
The available message templates are:

- Closed invites
- Open invites
- Pending invites
- Scheduled Appointments.

Configuration

<table>
<thead>
<tr>
<th>Setting</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidate Portal Messaging</td>
<td>Scheduling Center &gt; Configuration</td>
</tr>
</tbody>
</table>

Configuring Candidate Portal Messages

Prerequisite
The Manage Scheduling Center user type permission is required.

Scheduling Center > Configuration > Candidate Portal Messaging

Steps
1. Click the candidate portal to configure.
2. Select locale if applicable.
3. Update Header text. Apply formatting as appropriate.
   If no updates are made, the default Header text will be displayed.
4. Update message text. Apply formatting as appropriate.
5. Click Preview (Optional).
6. Click Save.

Result
Message is updated for the candidate portal message for the selected locale.
Email Templates

Emails sent via the Taleo Scheduling Center can be configured to reflect an organization communication style, standards, and requirements.

The Administrator have the ability to configure system emails with their organization branding rather than having only one email model used by all users. If email templates are not configured, then the system default templates are used.

The following default types of email templates are supplied with the system:

Appointment Canceled
- Appointment Canceled - Calendar Owner
- Appointment Canceled - Candidate
- Appointment Canceled by Recruiter - Candidate

Appointment Confirmed
- Appointment confirmed - Calendar Owner
- Appointment confirmed - Full Candidate Permissions
- Appointment confirmed - No Permissions
- Appointment confirmed - Cancel Only Permissions
- Phone Confirmed - Full Candidate Permissions
- Phone Confirmed - No Permissions
- Phone Confirmed - Cancel Only Permissions

Appointment Request
- Appointment Request - Full candidate Permissions
- Appointment Reschedule Request - Full candidate Permissions
- Phone appointment - Full Candidate Permissions
- Phone appointment Reschedule Request - Full Candidate Permissions

Appointment Rescheduled
- Appointment Reschedule Notification - Cancel Only Permissions
- Appointment Reschedule Notification - Full Candidate Permissions
- Appointment Reschedule Notification - No Permissions
- Appointment Reschedule Request - Full Candidate Permissions
- Phone Reschedule Notification - Cancel Only Permissions
- Phone Reschedule Notification - Full Candidate Permissions
- Phone Reschedule Notification - No Permissions
- Phone Appointment Reschedule Request - Full Candidate Permissions

Appointment Soon
- Appointment Reminder - Full Candidate Permissions
- Appointment Reminder - Cancel Only Permissions
- Appointment Reminder - No Permissions
- Phone Reminder - Full Candidate Permissions
• Phone Reminder - Cancel Only Permissions
• Phone Reminder - No Permissions

The first part of the email name represents in which instance the email will be used and the second part represents the candidate permission to whom the email will be sent. For example, "Appointment Canceled - Candidate": this email template will be used to cancel an appointment and the candidate will receive the message.

Templates cannot be manually created, however default templates can be modified to the specific needs of your organization. Only one default template can exist for each type of email.

A template is edited either by typing text or by adding variables. These variables will automatically call information from the application and display it in the template. For example, if the variable [Candidate.LastName] is used in the template then the last name of the candidate will be automatically included in the template by the system. Variables can only be added to templates from the Merge Field selection list available on the Edit Template page and not copied and pasted from other templates.

A user can choose to attach an iCalendar data file (ICS file) to the Appointment Confirmed email templates. If the ICS file is attached to the email template, then the candidate and the Calendar Owner receiving the email confirmation notification will be able to add the confirmation to their calendar.

By default, notifications are not sent automatically by the system, email are sent only if the user has set the Send email field to Yes.

Email templates can be configured for multiple languages.

**Revert to Default Available for Email Templates**

Scheduling Center administrators have the ability to overwrite custom text on email templates with the default text.

Default text is provided for all the email templates used in Taleo Scheduling Center. This text is configurable and can be edited for specific needs. If the text on an email template has been modified from the default, **Revert to Default** will appear in the Actions column of the list on the Email Templates page. When this link is clicked, a message box will appear to confirm the action before any custom text is replaced with default text. The email template will display only the originally provided default text and all custom text will be deleted.

**Configuration**

<table>
<thead>
<tr>
<th>Setting</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Templates</td>
<td>Scheduling Center &gt; Configuration</td>
</tr>
</tbody>
</table>

**Information on the Email Template Page**

Information about each template is provided on the Email Template page.

<table>
<thead>
<tr>
<th>Email Template Page List Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Name of the email.</td>
</tr>
<tr>
<td>Recipient</td>
<td>The role of the recipient of the email.</td>
</tr>
<tr>
<td>Service Level</td>
<td>The permission level of the recipient, when the recipient is a candidate. Possible values are:</td>
</tr>
<tr>
<td></td>
<td>• None</td>
</tr>
<tr>
<td></td>
<td>• Cancel Only</td>
</tr>
<tr>
<td>Email Template Page List Column</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>-------------</td>
</tr>
</tbody>
</table>
| Description                     | • Full
|                                 | • All - All candidates can receive the email, regardless of their permission level. |
| Location Type                   | The location type associated with the calendar. |
| Actions                         | If the text on an email template has been modified from the default, Revert to Default will appear in the Actions column of the list on the Email Templates page. |

**Editing an Email Template**

**Prerequisite**
The Manage Scheduling Center user type permission is required.

*Scheduling Center > Configuration > Email Templates*

**Steps**
1. Click an email template.
2. Modify text as required.
3. Click *Update*.

**Adding a Variable to an Email Template**

**Prerequisite**
The Manage Scheduling Center user type permission is required.

*Scheduling Center > Configuration > Email Templates*

**Steps**
1. Click an email template.
2. Place cursor in the email template at the position to add variable.
3. Select variable from *Merge Fields*.
4. Click *Update*.

**Result**
The variable is added to the email template.

**Adding a Static Hyperlink to an Email Template**

**Prerequisite**
The Manage Scheduling Center user type permission is required.

*Scheduling Center > Configuration > Email Templates*

**Steps**
1. Click an email template.
2. Type desired text into the body of the template.
3. Select the typed text.
4. Click Link.
5. Select Link Type, Protocol, and enter URL.
6. Click OK.
7. Click Update.

Result
The typed text is a clickable hyperlink.

Next Step
The static hyperlink can be removed by selecting the link and clicking Unlink.

Email Template Activation
Allows an Administrator to choose if an email will be sent or not by the system.

The Administrator can choose to inactivate an email template meaning that emails using this template will not be sent to the candidate. All email templates are by default set to Active, that is emails based on the template are sent to the candidates by the system.

Activation or inactivation is automatically applied to every locale version of the calendar.

Activating an Email Template
Prerequisite
The Manage Scheduling Center user type permission is required.
The email template must be inactive.

Scheduling Center > Configuration > Email Templates
Steps
1. Click on an email template.
2. In the Edit page, select Yes.
3. Click Update.

Result
Emails using this template will be sent by the system.

Inactivating an Email Template
Prerequisite
The Manage Scheduling Center user type permission is required.
The email template must be active.

Scheduling Center > Configuration > Email Templates
Steps
1. Click on an email template.
2. In the Edit page, select No.
3. Click Update.

Result
Emails using this template will no longer be sent by the system.

Adding an iCalendar Data File to an Email Template

Prerequisite
The Manage Scheduling Center user type permission is required.
A Calendar role grants users access to this feature.

Scheduling Center > Configuration > Email Templates

Steps
1. Select an Appointment Confirmed email template.
2. Select Yes for the Send .ics field.
3. Click Update.

Result
When the email is sent, the .ics file is added to the email allowing the recipients to add the appointment to their calendar.
Location Templates

Location Template

Information on how and where an interview will take place can be saved as a template for reuse purposes.

In the Taleo Scheduling Center, it is possible to create a template for location information. When creating a calendar, information on where or how an interview will be carried out must be completed. The Administrator must choose the location where the appointment will take place. If templates are created for a specific location, information will be automatically populated into the fields when the calendar is created for a chosen location.

The Administrator can choose to use the location information as is, or to modify it. In this case, the changes will not be saved in the template and will apply only for that specific calendar. To save the changes into the template, the location must be modified and saved in the Location configuration pages.

Creating a Location Template

Prerequisite

The Manage Scheduling Center user type permission is required.

*Scheduling Center > Configuration > Locations*

Steps

1. In the Quick Filters panel, select the type of location, that is In person or By phone.
2. Click *Add New Location*.
3. Complete fields regarding the location of the appointment.
4. Select one or several languages for the location.
5. Enter details regarding the appointment in the language selected.
6. Click *Save*.

Result

If this location is selected when creating a calendar, the information will be automatically populated in the fields of the new calendar.

Editing a Location Template

Prerequisite

The Manage Scheduling Center user type permission is required.

*Scheduling Center > Configuration > Locations*

Steps

1. Click on a location template.
2. Modify fields as required.
3. Click *Save*.

Result

Changes will reflect in the location template used to create a calendar.
Calendar Imports

Calendar Import

The Administrator can import a large number of calendars to have them automatically created by the system. In cases where a large number of calendars need to be created, the Administrator can have the system automatically create several calendars at a time. The Administrator adds information, such as name and scheduling cushion, in a spreadsheet for each calendar needing to be created. This information is uploaded in the system then calendars are automatically created with the information included in each row of the spreadsheet. Calendars are then downloaded into the Taleo Scheduling Center. Once these calendars are imported in the Taleo Scheduling Center, they are available to the Administrator and Calendar Owner, but permissions will need to be granted for any other type of users for them to have access to these calendars. These calendars can be used as is in the Taleo Scheduling Center or edited.

Importing Calendars

Prerequisite

The Manage Scheduling Center user type permission is required.
All spreadsheet fields must be completed.
Only one upload can be performed at a time.
Secondary locale information is optional.

*Scheduling Center > Configuration > Import Calendars*

Steps

1. Click on a template, that is Phone Calendar Template or In Person Calendar Template.
2. Click *Open*.
3. In the displayed spreadsheet, complete all fields for each calendar to be created.
4. Save the Excel file in a CSV format.
5. Log back in to the Taleo Scheduling Center.
6. In the Import Calendars page, click Browse to select the CSV file previously saved.
7. Select a type of calendar from the Select Calendar Type field (same type as for the CSV file).
8. Select if the first row of the spreadsheet contains headers or not.
9. Click *Save*.

Result

The spreadsheet is validated by the system, uploaded and then calendars are created in the Taleo Scheduling Center. Download can take several minutes for large imports.
Mass Update

Ability to Mass Update Calendar Owners

Calendars, Permissions, and Timeslots can be transferred from one Scheduling Center user to another in a single action.

The Mass Update function allows all of a recruiter's or other Scheduling Center user's items to be reassigned to another recruiter or Scheduling Center user. This transfer includes all current ownership of calendars and timeslots, as well as permissions the originating recruiter has been granted for other calendars.

A Scheduling Center administrator accesses the originating recruiter or other user's items by selecting them from Select Owner on the Mass Update page. Once the owner is selected, the Scheduling Center presents a count of all calendars, permissions, and timeslots for that owner. The new user can then be selected using Select Owner by the Select New User field. Once submitted, all items are transferred to the new owner.

Configuration

<table>
<thead>
<tr>
<th>Setting</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mass Update</td>
<td>Scheduling Center &gt; Configuration</td>
</tr>
</tbody>
</table>

Mass Updating Calendar Owners

Prerequisite

The Manage Scheduling Center user type permission is required.

Scheduling Center > Configuration

Steps

1. Click Mass Update.
2. Click Select Owner.
3. Click Select User.
4. Click Submit.
   - The Scheduling Center presents a count of all calendars, permissions, and timeslots for that owner.
5. Click Submit.

Result

All items are transferred to the new owner.
Time Zones

Time Zone Configuration

The Administrator has the ability to identify which time zones are visible to users in the Taleo Scheduling Center. A setting is available: Display Time Zones. This setting allows system administrators to select the time zones displayed to users. When implementing a new zone, all time zones available in the Display Time Zones setting are selected by default.

When a time zone has been enabled by a Scheduling Center administrator and then assigned to a calendar by a recruiter, it cannot be disabled while the calendar is active. The time zone will appear grayed out on the Display Time Zone page. If the calendar is no longer active, and the time zone is not used in any other active calendar, the time zone can be disabled. The Display Time Zone page displays a message that states "Time Zones that are not editable are in use."

<table>
<thead>
<tr>
<th>Setting</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Time Zones</td>
<td>Scheduling Center &gt; Administration</td>
</tr>
</tbody>
</table>

Then, when users are creating calendars, they will only see and be able to select the time zones selected by the administrator.
Languages

The Taleo Scheduling Center is available in many languages.

The Language drop-down menu located in the right-hand side of pages allows users to select the language in which they want to use the product. Languages must be activated by the system administrator before they can be used in the Taleo Scheduling Center.

When a language has been enabled by a Scheduling Center administrator and then assigned to a calendar by a recruiter, it cannot be disabled while the calendar is active. The language will appear grayed out on the Display Languages page. If the calendar is no longer active, and the language is not used in any other active calendar, the language can be disabled. The Display Language page displays a message that states "Languages that are not editable are in use."

Enabling Languages

**Prerequisite**

*Scheduling Center > Configuration > Display Languages*

**Steps**

1. Check the box next to the languages you want to display to users.
2. Click *Save*.

**Result**

Users will only see and be able to select the languages that were enabled.
## Fields

<table>
<thead>
<tr>
<th>Fields</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calendar Name</td>
<td>The name of the calendar name that is displayed to candidates when they are scheduling their appointment.</td>
<td>Scheduling Center &gt; Calendars</td>
</tr>
<tr>
<td>Active Calendar</td>
<td>Allows the calendar to be used in a requisition for candidates to book appointments.</td>
<td>Scheduling Center &gt; Calendars</td>
</tr>
<tr>
<td>Candidate Self-Service Level</td>
<td>Sets the permission level for candidates to control their appointments. A candidate may be granted full scheduling capabilities (that is, scheduling, rescheduling, canceling - this is the highest level of permissions), or may be restricted to only canceling an appointment or have no permissions at all.</td>
<td>Scheduling Center &gt; Calendars</td>
</tr>
<tr>
<td>Allow Same Day Scheduling</td>
<td>Allows candidates to schedule an appointment for the same day on which they make the appointment.</td>
<td>Scheduling Center &gt; Calendars</td>
</tr>
<tr>
<td>Scheduling Cushion (in minutes)</td>
<td>Applies to same day scheduling. Represents the amount of time prior to an appointment that a candidate can self-schedule. For example, if set to 60 minutes and the candidate is self-scheduling 30 minutes prior to the appointment, that appointment will be unavailable.</td>
<td>Scheduling Center &gt; Calendars</td>
</tr>
<tr>
<td>Scheduling Horizon (in days)</td>
<td>Represents how long in advance a candidate may book an appointment on a calendar. The default value is 14 days in advance. The scheduling horizon can be set to 60, 90 or to a maximum interval of 180 days. The scheduling horizon can be edited once appointments have been made on the calendar.</td>
<td>Scheduling Center &gt; Calendars</td>
</tr>
<tr>
<td>Appointment Change (lock-down)</td>
<td>Determines for a calendar how close to the time of a confirmed appointment a candidate will be allowed to reschedule.</td>
<td>Scheduling Center &gt; Calendars</td>
</tr>
<tr>
<td>Calendar Owner</td>
<td>The person responsible for maintaining the calendar.</td>
<td>Scheduling Center &gt; Calendars</td>
</tr>
<tr>
<td>Calendar Display Name</td>
<td>The name of the calendar as the user wants it to display to the candidates. The calendar name that displays internally to users is often different than what is shown to candidates.</td>
<td>Scheduling Center &gt; Calendars</td>
</tr>
<tr>
<td>Fields</td>
<td>Description</td>
<td>Location</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------</td>
</tr>
<tr>
<td>Select As Primary Locale</td>
<td>Displays the language in which the calendar will be displayed to the administrator and recruiters. Note: If only one language is offered, it will default to the current language and the button will automatically be checked.</td>
<td>Scheduling Center &gt; Calendars</td>
</tr>
<tr>
<td>Multiple Location</td>
<td>Indicates that a calendar is created for several locations (maximum of 5 locations).</td>
<td>Scheduling Center &gt; Calendars</td>
</tr>
<tr>
<td>Single Location</td>
<td>Indicates that a calendar is created for one location.</td>
<td>Scheduling Center &gt; Calendars</td>
</tr>
<tr>
<td>Location Type</td>
<td>Indicates if the interview will be held in person (default) or on the phone.</td>
<td>Scheduling Center &gt; Calendars</td>
</tr>
<tr>
<td>Calendar Location Name</td>
<td>The name of the location created by the Administrator as visible within Taleo Scheduling Center.</td>
<td>Scheduling Center &gt; Calendars</td>
</tr>
<tr>
<td>Location Display Name</td>
<td>The name of the location as it is displayed to candidates.</td>
<td>Scheduling Center &gt; Calendars</td>
</tr>
<tr>
<td>Pre-schedule Information</td>
<td>Instructions such as asking the candidate to bring two types of ID, to dress business casual, etc.</td>
<td>Scheduling Center &gt; Calendars</td>
</tr>
<tr>
<td>Interview Directions</td>
<td>The user creating a calendar can input directions to the appointment location.</td>
<td>Scheduling Center &gt; Calendars</td>
</tr>
<tr>
<td>Interview Instructions</td>
<td>The user creating a calendar can input instructions for the appointment, for example to tell the candidates to check in at the front desk.</td>
<td>Scheduling Center &gt; Calendars</td>
</tr>
<tr>
<td>Timeslot Owner</td>
<td>When a timeslot owner is assigned to a timeslot, the timeslot owner receives an email each time a candidate schedules an appointment for the assigned timeslot. If no timeslot owner is selected, the calendar owner receives the email.</td>
<td>Scheduling Center &gt; Calendars</td>
</tr>
<tr>
<td>Schedule up to a maximum</td>
<td>Maximum number of timeslots available for the time selected. A maximum of 999 timeslots can be set.</td>
<td>Scheduling Center &gt; Timeslots</td>
</tr>
<tr>
<td>Interval in minutes</td>
<td>How long the appointment will last. The system will automatically create appointments based on start time/end time and interval. For example, a start time of 9:00 am and an end time of 11:00 am for interval of 30 minutes will result in time slots being automatically generated for 9:00; 9:30; 10:00 and 10:30.</td>
<td>Scheduling Center &gt; Timeslots</td>
</tr>
<tr>
<td>Fields</td>
<td>Description</td>
<td>Location</td>
</tr>
<tr>
<td>--------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------</td>
</tr>
<tr>
<td>Roster Report</td>
<td>A roster report is a listing of scheduled appointments for the calendar and date time frame selected. It will list who has been scheduled and if they arrived at their appointed time.</td>
<td>Reports</td>
</tr>
</tbody>
</table>