Oracle Taleo Enterprise
Recruiting Configuration Guide
Feature Pack 13C
Part Number: E51626-06

December 12, 2014
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<td>Added a note regarding authentication requirements to view attachments when sharing candidates. Also added a note regarding the &quot;Share Other Attachments&quot; setting.</td>
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<td>December 12, 2014</td>
<td>Changed the description of the setting &quot;Candidate and Job Submission Sharing Configuration&quot;.</td>
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<td>July 30, 2014</td>
<td>Added details regarding fonts and links embedded in original attachments.</td>
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<td>Added a note regarding the use of token variables in the &quot;Share Candidate Notification - Link to Access Shared Candidate Information&quot; message template.</td>
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<td>June 6, 2014</td>
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<td>May 8, 2014</td>
<td>Added notes regarding the use of languages and attachments in the Sharing Candidate Files feature.</td>
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<td>February 11, 2014</td>
<td>Added information regarding the integration of the Social Sourcing product.</td>
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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.
Getting Started

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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. Click Forgot 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, Scheduling Center, Social Sourcing.
- Finally, Taleo customers 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.
Getting Help

Online Help

The administration module offers an online help that provides comprehensive information about concepts or tasks to perform.

The online help, represented by this icon or the Help link, is available in the auxiliary navigation bar located in the top right-hand corner of all pages. When clicking the icon or link, a table of contents of available help topics is displayed. It is also possible to search the help database to locate specific subjects.

Web Support Link

The Web Support link gives users access to the My Oracle Support.

The Web Support link is available in the auxiliary navigation bar of all pages of the application. From the site, you can:

• Search and browse the Knowledge database.
• Obtain product documentation.
• Submit an incident.

Tooltip

A tooltip is a short, explanatory text which appears when “hovering” a mouse over a button, a link, a table cell heading or icon without clicking it.

Tooltips are available throughout the system and they give additional information about an action before performing it. Tooltips are provided for buttons, links, icons, and table cell headings. These tooltips are not configurable. However, for screening services, the system administrator can create tooltips for some types of user-defined fields.

Release Notes Message

A pop-up message containing new release information, system improvements, important messages and other information can be displayed when users log into the system.

Once they are logged in, users can turn off the Release Notes message by selecting the Don’t display the message again option. The message will then reappear only when new release information or other important information is available or if the users clear their browser cookies.

The same release notes message is displayed to users regardless of the product.

Deactivating the Release Notes Message

Prerequisite

The release notes message must have been enabled.
Steps

1. Log into a product.
2. On the Release Notes page, select the "Don’t display this message again" option.

Result

The release notes message will no longer be displayed until new release information or other important information is available. If you want to see the release note information again before new released information is available, delete your browser cookies.
Menus and Navigation Tools

Configuration Menu

The Configuration menu gives system administrators access to all administration components of Taleo Enterprise products in one centralized menu.

The Configuration menu is composed of sub-administration menus divided into two main sections:

- Central Configuration: Elements in the Central Configuration menu are used to manage content, data, settings, and configurations that are used across multiple products.
- Specific Configuration: Elements in the Specific Configuration menu are used to manage content, data, settings, and configurations that are targeted to a specific product or product area.

Depending on the products activated within your organization, the Configuration menu may include these elements.

<table>
<thead>
<tr>
<th>Central Configuration</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operations</td>
<td>Operation Modes and Release Notes.</td>
</tr>
<tr>
<td>General Configuration</td>
<td>Settings and Welcome Center Content.</td>
</tr>
<tr>
<td>Selection Lists</td>
<td>Standard selections used in different products such as Education Levels,</td>
</tr>
<tr>
<td></td>
<td>Employee Statuses, etc.</td>
</tr>
<tr>
<td>Roles</td>
<td>Role definitions of both hierarchical and functional roles. Both role types</td>
</tr>
<tr>
<td></td>
<td>are used for the Dynamic Approval Routing feature. In addition, functional</td>
</tr>
<tr>
<td></td>
<td>roles are used in defining Onboarding tasks.</td>
</tr>
<tr>
<td>Dynamic Approval Routing</td>
<td>Approval workflow definitions for requisitions and offers according to</td>
</tr>
<tr>
<td></td>
<td>specified business rules.</td>
</tr>
<tr>
<td>Security</td>
<td>Security policies, message templates related to access and passwords, and</td>
</tr>
<tr>
<td></td>
<td>legal agreements presented to users when signing in an application. Note</td>
</tr>
<tr>
<td></td>
<td>that agreements for career sections are managed under Career Section</td>
</tr>
<tr>
<td></td>
<td>Administration.</td>
</tr>
<tr>
<td>Competencies</td>
<td>Competency tools used in Taleo Performance for Rating Models, Competencies,</td>
</tr>
<tr>
<td></td>
<td>Guidance Plans, etc.</td>
</tr>
<tr>
<td>Synchronization Tool</td>
<td>A tool to export configuration elements, such as career sections, application</td>
</tr>
<tr>
<td></td>
<td>flows, etc., from a source database to a target database.</td>
</tr>
</tbody>
</table>

| Specific Configuration     |                                                                            |
|----------------------------|                                                                            |
| • SmartOrg                 |                                                                            |
| • Recruiting               |                                                                            |
| • Career Section           |                                                                            |
Specific Configuration

- Onboarding
- Transitions
- Taleo Performance
- Evaluation Management
- Reporting and Analytics

Configuration

The *Access Administration* permission is required to access the Configuration menu.

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

Recruiting Administration Menu

The Recruiting Administration menu allows system administrators to fully configure Recruiting Center features.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>List Format</td>
<td>Configuration of candidate and requisition list formats.</td>
</tr>
<tr>
<td>Fields</td>
<td>Configuration of candidate, requisition, and offer fields, selections as well as custom fields used in reports. Configuration of department and offer fields layout. Configuration of the candidate file identifier.</td>
</tr>
<tr>
<td>File Configuration</td>
<td>Creation and configuration of user-defined forms and user-defined files.</td>
</tr>
<tr>
<td>Process</td>
<td>Configuration of candidate selection workflows, search fields, matching candidate filters and criteria as well as matching requisition criteria.</td>
</tr>
<tr>
<td>Correspondence</td>
<td>Configuration of message templates and paragraphs.</td>
</tr>
<tr>
<td>General Configuration</td>
<td>Configuration of Recruiting Center settings, agencies, department and position lists, merge forms, notifications, requisition types, duplicate check, and center stage.</td>
</tr>
<tr>
<td>Source Tracking</td>
<td>Configuration of sources.</td>
</tr>
<tr>
<td>Integration</td>
<td>Configuration of job board accounts, screening services, and candidate sourcing services.</td>
</tr>
<tr>
<td>Automated Tasks</td>
<td>Configuration of automated tasks used to delete and archive information contained in the database.</td>
</tr>
<tr>
<td>Product Resources</td>
<td>Display of resource ID of user interface labels.</td>
</tr>
<tr>
<td>Element</td>
<td>Description</td>
</tr>
<tr>
<td>--------------</td>
<td>-------------------------------------------------------</td>
</tr>
<tr>
<td>Talent Exchange</td>
<td>Configuration of Talent Exchange exclusion rules.</td>
</tr>
</tbody>
</table>

**Configuration**

The *Access Administration* permission is required to access the Recruiting Administration menu.

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

**Auxiliary Navigation Bar**

The auxiliary navigation bar is the bar located at the top right of pages.

If enabled, the auxiliary navigation bar is available at all times for users to see and access.

The auxiliary navigation bar may contain the following elements (if enabled and if users were granted access to them):

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
</table>
| Home    | • If you have access to multiple Taleo products and you click Home, the Welcome Center is displayed.  
          • If you have access to Recruiting only and you click Home, the Recruiting Center front page is displayed. |
| Resources | May include:                                                                                   |
|          | • My Setup: Access to personal preferences.                                                      |
|          | • Training: Access to online training materials.                                                |
|          | • e-Learning: Access to eLearning materials.                                                     |
|          | • Help: Access to the online help.                                                               |
|          | • About: Information about the product such as the version number and the build number you need to provide to Oracle Support when you need to contact them. |
| Sign Out | Terminates the session and you are automatically signed out of all Taleo products.               |

**Breadcrumb Trail**

The breadcrumb trail located at the top of each page allows users to see where they are located within the application and to jump to previously viewed pages. The breadcrumb trail is only available in navigation mode; it disappears in edit mode.
Navigation Icons

When information is spread across multiple pages, navigation icons are available.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>←</td>
<td>Displays the previous page.</td>
</tr>
<tr>
<td>←</td>
<td>Goes to the previous 10 pages.</td>
</tr>
<tr>
<td>→</td>
<td>Displays the next page.</td>
</tr>
<tr>
<td>→</td>
<td>Goes to the next 10 pages.</td>
</tr>
</tbody>
</table>

Recently Viewed Items

The Recently Viewed Items pane contains direct links to the last ten pages you most recently accessed (according to your permissions) during the current session or previous ones. They can be pages where you made modifications or simply pages that you accessed without making modifications. To access a recently viewed item, simply click the item.
Basic Concepts

Application Time-out

A security feature warns users when the application has not been used for more than thirty minutes even if a user is still signed into the application. When the time-out delay is reached, a message notifies users that the time-out delay for the application is imminent.

Two scenarios are possible:

• User takes action: When the application has been idled for thirty minutes, a message notifies the user that the application requires attention. Clicking “Access the application” directs the user to the application. When the user accesses the application, he/she can reset the application and a message indicates the remaining time before the session expires.
• User does not take action: If the user does not reset the application within the defined delay, a message is displayed, indicating that the user has been signed out of the application and has to sign in again to use the application.

The time-out delay is set by default to thirty minutes. The reminder displayed before time-out is set by default to ten minutes before time-out.

Configuration

A private setting (Reminder Delay Before Timeout) allows the configuration of the application time-out for Recruiting, Onboarding, Transitions, Performance and Configuration products. Contact Oracle Support for details.

Reporting Update

Oracle Taleo Reporting has been updated to be accessed through the welcome center and administered through SmartOrg.

Read the Oracle Taleo Reporting release notes carefully before updating Oracle Taleo Enterprise to a 12C release or later version: there have been significant changes to the access paradigm and a mapping process must be completed before reporting content can be transferred successfully to 12C.

Element Status

A status indicates the current state of an element in the system. It allows users to create elements without making them available right away and to remove an existing element from use without removing it from the database.

Elements can have one of the following statuses:

• Draft: A Draft element can be modified. A Draft element cannot be used. It must be Active before it can be used.
• Active: When an element is Active, only the name and description can be modified. It is not possible to update the behavior of the element.
• Inactive: When an element is Inactive, only the status can be modified. The only possibility is to go back to the Active status.

A Draft element can become Active. An Active element can become Inactive. An Inactive element can become Active. However, an Active element cannot “go back” to the Draft status.
History Tracking

The History feature in the administration module presents useful tracking details on an element.

The three most recent events are displayed in the History section. To view a more complete listing of events, click More Info.

<table>
<thead>
<tr>
<th>History Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date and Time</td>
<td>Date and time when an event occurred.</td>
</tr>
<tr>
<td>Event</td>
<td>Event or action performed on an element.</td>
</tr>
<tr>
<td>Details</td>
<td>Information regarding the event.</td>
</tr>
<tr>
<td>By</td>
<td>The &quot;actor&quot; (person or system) who performed the event.</td>
</tr>
</tbody>
</table>

Information of the user that performed an action on an element can be viewed for better tracking and troubleshooting purposes.

⚠️ History tracking of items such as settings and user types are not item specific. Tracking is global for all changes made in the area. This means if looking at a specific user type and going to view history, you will see all of the history for all user type changes, not just the changes that have occurred with that specific user type.

History Events Retention Period Before Deletion

History events are deleted systematically from the system after a certain period of time. This deletion applies to SmartOrg, General Configuration, Recruiting and Performance.

<table>
<thead>
<tr>
<th>SmartOrg Element</th>
<th>Retention (Months)</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Account (user access)</td>
<td>6</td>
</tr>
<tr>
<td>User Defined Selection</td>
<td>12</td>
</tr>
<tr>
<td>User</td>
<td>12</td>
</tr>
<tr>
<td>Welcome Center Content</td>
<td>12</td>
</tr>
<tr>
<td>Seat</td>
<td>12</td>
</tr>
<tr>
<td>Coverage Area</td>
<td>12</td>
</tr>
<tr>
<td>Message Template</td>
<td>12</td>
</tr>
<tr>
<td>Document</td>
<td>12</td>
</tr>
<tr>
<td>SmartOrg Element</td>
<td>Retention (Months)</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>--------------------</td>
</tr>
<tr>
<td>Paragraph</td>
<td>12</td>
</tr>
<tr>
<td>Message</td>
<td>12</td>
</tr>
<tr>
<td>User Type</td>
<td>12</td>
</tr>
<tr>
<td>Group</td>
<td>12</td>
</tr>
<tr>
<td>Configuration Profile</td>
<td>12</td>
</tr>
<tr>
<td>User File</td>
<td>18</td>
</tr>
<tr>
<td>Organization</td>
<td>18</td>
</tr>
<tr>
<td>Organization Level</td>
<td>12</td>
</tr>
<tr>
<td>Location</td>
<td>18</td>
</tr>
<tr>
<td>Location Level</td>
<td>18</td>
</tr>
<tr>
<td>Job Field</td>
<td>18</td>
</tr>
<tr>
<td>Job Field Level</td>
<td>18</td>
</tr>
<tr>
<td>Business Organization</td>
<td>18</td>
</tr>
<tr>
<td>Business Organization Level</td>
<td>18</td>
</tr>
<tr>
<td>Positions</td>
<td>18</td>
</tr>
<tr>
<td>Competency</td>
<td>18</td>
</tr>
<tr>
<td>Competency Category</td>
<td>18</td>
</tr>
<tr>
<td>Competency Group</td>
<td>18</td>
</tr>
<tr>
<td>Competency Context</td>
<td>18</td>
</tr>
<tr>
<td>Competency Definition Context</td>
<td>18</td>
</tr>
<tr>
<td>Competency Guidance Plan</td>
<td>18</td>
</tr>
<tr>
<td>Rating Dimension</td>
<td>18</td>
</tr>
<tr>
<td>Rating Model</td>
<td>18</td>
</tr>
<tr>
<td>Job Role</td>
<td>18</td>
</tr>
<tr>
<td>Job Role Context</td>
<td>18</td>
</tr>
<tr>
<td>Job Profile Classification</td>
<td>18</td>
</tr>
<tr>
<td>Product Setting</td>
<td>24</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>General Configuration Element</th>
<th>Retention (Months)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reminder</td>
<td>12</td>
</tr>
<tr>
<td>Custom Selection</td>
<td>24</td>
</tr>
<tr>
<td>Recruiting Element</td>
<td>Retention (Months)</td>
</tr>
<tr>
<td>--------------------------------------------</td>
<td>--------------------</td>
</tr>
<tr>
<td>Automated Tasks</td>
<td>24</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Taleo Performance Element</th>
<th>Retention (Months)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Batch Transaction</td>
<td>0</td>
</tr>
<tr>
<td>User-defined Selections</td>
<td>12</td>
</tr>
<tr>
<td>Talent Pool Management Center</td>
<td>12</td>
</tr>
<tr>
<td>Performance Management Center</td>
<td>12</td>
</tr>
<tr>
<td>Chart Configuration</td>
<td>12</td>
</tr>
<tr>
<td>Matrix Configuration</td>
<td>12</td>
</tr>
<tr>
<td>Competency Goal</td>
<td>14</td>
</tr>
<tr>
<td>Pool Item</td>
<td>14</td>
</tr>
<tr>
<td>Pool</td>
<td>14</td>
</tr>
<tr>
<td>Message Templates</td>
<td>12</td>
</tr>
<tr>
<td>Documents</td>
<td>12</td>
</tr>
<tr>
<td>Paragraphs</td>
<td>12</td>
</tr>
<tr>
<td>Product Setting</td>
<td>12</td>
</tr>
<tr>
<td>User Account (user access)</td>
<td>6</td>
</tr>
<tr>
<td>Review Text</td>
<td>12</td>
</tr>
<tr>
<td>Review Definition</td>
<td>12</td>
</tr>
<tr>
<td>Review Cycle</td>
<td>12</td>
</tr>
<tr>
<td>Business Goal</td>
<td>14</td>
</tr>
<tr>
<td>Business Project</td>
<td>12</td>
</tr>
<tr>
<td>Business Theme</td>
<td>12</td>
</tr>
<tr>
<td>Business Period</td>
<td>12</td>
</tr>
<tr>
<td>Employee Goal</td>
<td>14</td>
</tr>
<tr>
<td>Employee Goal Plan</td>
<td>14</td>
</tr>
<tr>
<td>Goal Template</td>
<td>12</td>
</tr>
<tr>
<td>Succession Plan</td>
<td>14</td>
</tr>
<tr>
<td>Development Activity</td>
<td>14</td>
</tr>
<tr>
<td>Development Plan</td>
<td>14</td>
</tr>
<tr>
<td>Development Plan Template</td>
<td>12</td>
</tr>
<tr>
<td>Taleo Performance Element</td>
<td>Retention (Months)</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>--------------------</td>
</tr>
<tr>
<td>Development Activity</td>
<td>12</td>
</tr>
<tr>
<td>Development Activity Category</td>
<td>12</td>
</tr>
<tr>
<td>Mentoring Relationship</td>
<td>14</td>
</tr>
<tr>
<td>Rating Dimension</td>
<td>12</td>
</tr>
<tr>
<td>Rating Model</td>
<td>12</td>
</tr>
<tr>
<td>Partners</td>
<td>12</td>
</tr>
</tbody>
</table>

**Refine by Option**

The Refine by option allows users to filter a list according to different criteria.

The Refine by option is available throughout the system. When an element is selected in the Refine by list, users have to enter data in a field or select an element by which the list will be filtered. The Refresh button must then be clicked to refresh the list.

```
Refine by
All ▼ Refresh
```

**Rich Text Editor**

The Rich Text Editor enables users to edit and format text contained in correspondence, requisitions, and requisition templates.

The Rich Text Editor contains standard word processing tools such as:

- cut, copy, and paste functions
- font types and sizes
- bold, italics, and underline
- text and background color
- left, right, and center alignment
- numbered and bulleted lists
- spell checker

Best Practice: To improve the formatting of your text, it is recommended to:

- Copy and paste your text to any simple text editor such as Windows Notepad.
- Copy your text from the text editor and paste it into the Rich Text Editor field.
- Format your text using the Rich Text Editor.

The spell checker uses the application language, not the content language. The spell checker is available in the following languages: English, English (US), French (Canada), French (France), Spanish, German, Italian, Dutch, Portuguese, Portuguese (Brazil), Swedish, Danish, Finnish, Norwegian.
Users on Internet Explorer 8 may experience issues with the toolbar icons operating as expected. Users who experience this issue may either try viewing the page in Compatibility Mode, or use the Rich Text Editor in another browser such as Internet Explorer 7 or Firefox.

Languages

Taleo products are available in different optional languages.

Not all languages are available for all Taleo products and languages must be activated by the system administrator before they can be used in an application.

The preferred language of a user is set in the user’s account by the system administrator. The preferred language is used by the system as the default content language which is the same across all Taleo products. If a product does not support the same set of content languages, it will have its own preference configuration.

In Taleo applications, the languages in which an element is available are indicated in the Languages field. When creating or editing an element, the user can choose the base language as well as the languages in which an element will be available. The base language of an element is the item’s reference language, usually used as a reference for other languages or fallback display in list mode. The user’s preferred language is used as the default base language when the user creates an element. The base language of an element can be changed at any time by the user. A language must be activated before it can be designated as a base language.

When multiple languages are used for an element, the icon is displayed. Hovering the mouse over the icon displays the languages activated for the element. When only one language is used for an element, the name of the language is displayed. When only one language is used in a company, there is no special indicator.

For a list of the languages supported by Taleo, refer to the document entitled Taleo Enterprise - Supported Languages.

Selecting the Base Language

Prerequisite

The element must be in Edit mode and the language must be active before it can be set as the base language.

Steps

1. Open an element.
2. Select Configure next to the Language drop-down list.
3. In the Language Configuration page, select the Base option for the desired language.
   Set the language to Active if that is not already the case.
4. Click Save.

Result

The word Base appears next to the language in the Language drop-down list of the element.

Next Step

You will need to complete the required fields (usually the Name) in the new base language.

Activating a Language

Prerequisite

The element must be in Edit mode.
Steps
1. Open the element that you want to make available in another language so its fields are in edit mode.
2. Select Configure next to the Language drop-down list.
3. In the Language Configuration page, select Active from the Status drop-down list for each required language.
4. Click Save.

Result
Activated languages appear in the Language drop-down list of element.

Next Step
Once a new language has been made active, some fields related to the element (most usually the Name) will need to be provided for each new active language.

Deactivating a Language

Prerequisite
The element must be in Edit mode and the language must not be the base language.

Steps
1. Open an element.
2. Select Configure next to the Language drop-down list.
3. For each language, select Not Used in the Status drop-down list.
   - If the language to deactivate is the Base language, you will need to select another active language as the base language.
4. Click Save.

Result
Selected languages no longer appear in the Language drop-down list of the element.
Central Configuration

• Operation Modes....................................................................................................... 21
• Release Notes Messages........................................................................................... 23
• Response Center (eShare)....................................................................................... 26
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• Network Data.............................................................................................................39
• Deep Linking..............................................................................................................43
• Configurable Employee Metrics................................................................................ 48
• Deletion Tasks........................................................................................................... 51
Operation Modes

Operation Mode

The operation mode of the Taleo system can be changed for service, configuration, or implementation purposes. Three operation modes are available:

- implementation
- maintenance
- production

System administrators have the ability to switch to maintenance mode or production mode for each product individually or for all. Products supported by the operation mode feature are:

- Recruiting (which also includes the Remote Manager Experience)
- Performance
- Career Section
- Onboarding
- New Hire Portal
- Transitions

For the above products, except the New Hire Portal, system administrators will know the number of users using both the product AND the administrative area related to the product. Note that candidates/new hires who are doing their Transitions processes are logged into the Career Sections, not into the New Hire Portal.

Implementation Mode: The implementation mode is usually only for new customers or new zones (databases). It is used during the initial configuration and implementation stages of the system. Once the implementation is completed, the implementation mode is no longer available to system administrators and a request must be made through Oracle Support. In implementation mode, system administrators can:

- Create, delete and modify the Organization-Location-Job Field structure.
- Create, delete and modify levels in the Organization-Location-Job Field structure.
- Create, delete and modify elements in the Organization-Location-Job Field structure.

If the Taleo Recruiting is in implementation mode, users cannot connect to the Remote Manager Experience.

If changes need to be made to the structure of the database after implementation, system administrators must contact Oracle Support and request that the system be put back into implementation mode.

Maintenance Mode: The maintenance mode is a special administrative feature used to protect the integrity of the database when editing Organizations, Locations, or Job Fields.

In maintenance mode, the application is inactive. All users, except system administrators, are logged out automatically. The application displays a message to users as well as to candidates in Career Sections, indicating that the application is in maintenance mode. If users are logged in and have not saved data they were entering, this data will be lost.

The system must be in maintenance mode for the following:

- Delete departments, both via Integration and SmartOrg.
- Delete positions, both via Integration and SmartOrg.
- Import job positions via Integration.
- Modify the Organization-Location-Job Field structure, both via Integration and SmartOrg.
- Modify levels in the Organization-Location-Job Field structure, both via Integration and SmartOrg.
• Edit Organization, Location, and Job Field elements (Element Management), both via Integration and SmartOrg.

There are no transactions in Taleo Transitions, Taleo Onboarding or Taleo Performance that require the maintenance mode. If Taleo Transitions is in maintenance mode and a user is performing a Start Transitions Process or a Cancel Transitions Process action from Taleo Recruiting, the transaction will still be scheduled to process.

If Taleo Recruiting is in maintenance mode, users can connect to the Remote Manager Experience.

Oracle Taleo customers and Oracle Taleo Support can place Taleo Recruiting in Maintenance mode (Configuration > Operation Modes) and then modify Organization, Location and Job Field (OLF) elements and the hierarchical structure. Prior to 12C, they were able to perform that action while Career Section was in Production mode. This would create situations where OLF were inconsistent between the two products. The issue was resolved in 12C and later releases such that both products must be placed in Maintenance mode before changes can be made to OLF elements and structure.

**Production Mode:** In production mode, all users as well as guests, agents, and system administrators have access to the application. In production mode, system administrators can:

• View structure elements for Organizations, Locations, and Job Fields.
• Save agencies, both via Integration and SmartOrg.
• Create and edit job templates.
• Select and view positions.
• Create and edit departments.

All tasks listed above can also be performed in maintenance mode and in implementation mode.

To import/export candidates (by Integration) and move candidates in the candidate selection workflow (by Integration), the system must be in production mode.

**Configuration**

To have access to the Operation Mode feature, the *Manage Application Mode* permission is required.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Application Mode</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Configuration &gt; Foundation Data</td>
</tr>
</tbody>
</table>

**Modifying the Operation Mode**

**Prerequisite**

The *Manage Application Mode* user type permission is required.

*Configuration > Operation Modes*

**Steps**

1. In the Operation Modes page, click Edit.
2. In the Operation Mode Editor page, select the desired mode for each product, that is production or maintenance mode.
3. Click Save.

**Result**

The selected operation mode appears beside each product. If the system is put in Maintenance mode, users currently logged will receive a message and will be logged out.
Release Notes Messages

Release Notes Message
A pop-up message containing new release information, system improvements, important messages and other information can be displayed when users log into the system.

Once they are logged in, users can turn off the Release Notes message by selecting the Don’t display the message again option. The message will then reappear only when new release information or other important information is available or if the users clear their browser cookies.

The same release notes message is displayed to users regardless of the product.

Configuring the Release Notes Message Feature
The configuration of the release notes feature consists of the following steps.
1. Creating the release notes message content.
2. Enabling the release notes setting in configuration profiles.

No default release notes message is provided by Taleo. A blank page is displayed unless the system administrator decides to customize the page to present important information to users.

Creating the Release Notes Message Content
Prerequisite
The Edit release notes user type permission is required.

Configuration > Release Notes
Steps
1. In the Release Notes page, click Edit.
2. In the Release Notes Editor page, write the message.
3. Clear the Do not display release note information check box.
4. Specify the validity period of the message by indicating the period of time when the message will be displayed.
5. Click Save.

Enabling the Release Notes Setting in a Configuration Profile
Prerequisite
The Release Notes message must be created.

Configuration > [SmartOrg] Administration > Configuration Profiles
Steps
1. Click a configuration profile.
2. Click the Release Notes setting.
3. Click Edit.
4. Select Yes.
5. Click Save.

Release Notes - Other Configuration Tasks

Editing the Release Notes Message

Prerequisite
The Edit release notes user type permission is required.

Configuration > Release Notes

Steps
1. Click Edit.
2. Modify the fields as required.
3. Click Save.

Setting the Release Notes Message Validity Period

Prerequisite
The Edit release notes user type permission is required.

Configuration > Release Notes

Steps
1. Click Edit.
2. Set the validity period with the calendar icon.
3. Click Save.

Next Step
The release notes message is displayed to users when they sign in the application only for the determined period provided the Do not display release note information is not selected and the Release Notes setting has been activated in the user’s configuration profile.

Displaying the Release Notes Message

Prerequisite
The Edit release notes user type permission is required.

Configuration > Release Notes

Steps
1. Click Edit.
2. Clear the Do not display release note information check box.
3. Click Save.
Hiding the Release Notes Message

Prerequisite
The *Edit release notes* user type permission is required.

*Configuration > Release Notes*

Steps
1. Click Edit.
2. Select the *Do not display release note information* check box.
3. Click Save.

Release Notes - Permissions and Settings

The following permissions and settings are used to configure the release notes feature.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit release notes</td>
<td>Allows users to edit the release notes message content.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Configuration &gt; Foundation Data</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Release Notes</td>
<td>Displays the release note information when accessing the application. Once the system administrator has created the content of the release notes message, the Release Notes setting must set to Yes in the user’s configuration profile.</td>
<td>No</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] Configuration Profiles</td>
</tr>
</tbody>
</table>
Response Center (eShare)

Logging In Before Accessing the Response Center

By default, eShare users need to log in before being able to access the Response Center.

The Response Center Login Required setting controls this feature. If you do not wish users to log in before accessing the Response Center, the setting must be set to No. Contact Oracle Support to have this setting modified.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Response Center Login Required</td>
<td>Requires the user to login before accessing the Response Center.</td>
<td>Yes</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
</tbody>
</table>
Settings, Security Policies, Legal Agreements

Settings

Settings are used to configure features and elements in Taleo products.

There are two types of settings:

- Global settings: Settings that affect multiple Taleo products.
- Product settings: Settings specific to a Taleo product, for example, Taleo Recruiting, Taleo Transitions, Taleo Onboarding or Taleo Performance.

The following table provides paths to global settings and product specific settings.

<table>
<thead>
<tr>
<th>Settings</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global settings</td>
<td>Configuration &gt; [General Configuration] Settings</td>
</tr>
<tr>
<td>SmartOrg settings</td>
<td>Configuration &gt; [SmartOrg] Settings</td>
</tr>
<tr>
<td>Recruiting settings</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Career Section settings</td>
<td>Configuration &gt; [Career Section] Settings</td>
</tr>
<tr>
<td>Onboarding settings</td>
<td>Configuration &gt; [Onboarding] Settings</td>
</tr>
<tr>
<td>Transitions settings</td>
<td>Configuration &gt; [Transitions] Settings</td>
</tr>
<tr>
<td>Taleo Performance settings</td>
<td>Configuration &gt; [Taleo Performance] Settings</td>
</tr>
<tr>
<td>Reporting and Analytics settings</td>
<td>Configuration &gt; [Reporting and Analytics] Settings</td>
</tr>
</tbody>
</table>

Settings are configured by system administrators. A default value is set by Taleo prior to application delivery. System administrators can change the value and the change will be applied throughout the application. If for a setting's value can be changed by a user, the new value will override the value set by the system administrator.

A setting has one of the following security levels:

<table>
<thead>
<tr>
<th>Security Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public</td>
<td>System administrators can view and change the setting.</td>
</tr>
<tr>
<td>Protected</td>
<td>System administrators can view the setting, but changes can only be performed by Taleo.</td>
</tr>
<tr>
<td>Private</td>
<td>System administrators cannot view or change the setting. Only Taleo can view and change the setting.</td>
</tr>
</tbody>
</table>

For a list of all available settings, refer to the document entitled *Taleo Enterprise 13C Settings*. 
Configuring a Setting

Prerequisite
The security level of the setting must be Public.
The Manage Settings user type permission is required.

For global settings:
*Configuration > [General Configuration] Settings*

For product settings:
*Configuration > [Product name] Settings*

Steps
1. Locate the setting using the Refine by list or the Feature column.
2. Click the name of a setting.
3. Click Edit next to the name of the setting.
4. Make changes.
5. Click Save.

Restoring the Default Value of a Setting

Prerequisite
The security level of the setting must be Public.
The Manage Settings user type permission is required.

For global settings:
*Configuration > [General Configuration] Settings*

For product settings:
*Configuration > [Product name] Settings*

Steps
1. Locate the setting using the Refine by list or the Feature column.
2. Click the name of a setting.
3. Click Reset next to the name of the setting.

Result
The default value of the setting is restored and the change is reflected in the product.

Regional Settings

The regional settings feature is used by system administrators to configure settings which control the number, date, currency, and language formats for a locale.

In the Regional Settings page, the Identifier list varies according to languages activated in the Taleo products. For example, if an organization only supports English (en) and French (fr), the Identifier list will contain en and fr as well as all specific locale identifiers related to fr and en, that is, fr-FR, fr-CA, en-GB, en-Au, etc.

The regional settings of a locale consist of four elements:
- Number: Defines the decimal symbol, digit grouping, maximum number of decimals, negative number format, etc.
- Currency: Defines the decimal symbol used for currencies, the default currency, the maximum number of decimals for currencies, etc.
- Date: Defines the date format used in the application. A date can be represented by text, number or a combination of both.
- Language: With each locale, comes a set of predefined values that are specific to the specified language, regardless of the country or region.

Configuring the Number Format

**Prerequisite**

*Configuration > [SmartOrg] Administration > Regional Settings*

**Steps**

1. Click the name of an identifier.
2. Click Edit next to Number.
3. Select a value for each setting.
4. Click Done.

Configuring the Currency

**Prerequisite**

*Configuration > [SmartOrg] Administration > Regional Settings*

**Steps**

1. Click the name of an identifier.
2. Click Edit next to Currency.
3. Select the values for each setting.
4. Click Done.

Configuring the Date Format

**Prerequisite**

*Configuration > [SmartOrg] Administration > Regional Settings*

**Steps**

1. Click the name of an identifier.
2. Click Edit next to Date.
3. Select a value for each setting. See *Date Format Properties*.
4. Click Done.

**Date Format Properties**

<table>
<thead>
<tr>
<th>Date Format</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full date format</td>
<td>Date represented by the day of the week, month, date and year. Default is EEEE, MMMM D, YYYY. Maximum number of characters: 255.</td>
</tr>
<tr>
<td>Date Format</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Long date format</td>
<td>Date represented by month, date and year. Default is MMMM D, YYYY. Maximum number of characters: 255.</td>
</tr>
<tr>
<td>Medium date format</td>
<td>Date represented by month and/or year. Default is D-MM-M-YYYY. Maximum number of characters: 255. In the case of regions that do not use commas, periods or slashes with dates, an additional format is included that is specific to the region. When no date format is selected, the medium format is the default format used by the application.</td>
</tr>
<tr>
<td>Short date format</td>
<td>Date represented by date, month and/or year. Default is DD/MM/YY. Short date formats are used for lists and calendars. Numeric values only.</td>
</tr>
<tr>
<td>Shortest date format</td>
<td>Date represented by date and month. Default is DMMM. Shortest date format are used in candidate files and other lists that include many columns.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date Format Details</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text</td>
<td>A date element that always appears in the form of text, such as days of the week, will be displayed in long form if four letters are used for its representation. If less than four letters are used, the date element will appear in an abbreviated form. For example, configuring a date format using “EEE” would produce “Fri” for Friday, while using “EEEE” would produce the long form “Friday”.</td>
</tr>
<tr>
<td>Numbers</td>
<td>The system adds zeros to single numbers in certain cases. For example, if the date element “DD” is part of the date format, the ninth day of the month will be displayed with a leading zero, thus, “09”. If the date element is “D”, however, the system will display “9” without a leading zero.</td>
</tr>
<tr>
<td>Text and Numbers</td>
<td>When the date format element is composed of one or two characters, a numeric value results. For example, if the date format element is “M” or “MM”, the month of February will be depicted as “2” and “02” respectively. On the other hand, a date format element made up of three or more characters will result in a textual representation of the date: in the case of “MMM”, February will appear as “FEB”, if “MMMM” is used, February will be displayed as “February”.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date Format Syntax</th>
<th>Meaning</th>
<th>Presentation</th>
<th>Example (US locale)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Y</td>
<td>Year</td>
<td>Numeric</td>
<td>2009</td>
</tr>
<tr>
<td>M</td>
<td>Month of the year</td>
<td>Alphanumeric</td>
<td>July, Jul. or 07</td>
</tr>
<tr>
<td>D</td>
<td>Day of the month</td>
<td>Numeric</td>
<td>10</td>
</tr>
<tr>
<td>H</td>
<td>Hour AM/PM (1-12)</td>
<td>Numeric</td>
<td>12</td>
</tr>
<tr>
<td>h</td>
<td>Hour of the day (0-23)</td>
<td>Numeric</td>
<td>22</td>
</tr>
<tr>
<td>m</td>
<td>Minute of the hour</td>
<td>Numeric</td>
<td>38</td>
</tr>
<tr>
<td>s</td>
<td>Seconds</td>
<td>Numeric</td>
<td>59</td>
</tr>
<tr>
<td>E</td>
<td>Day of the week</td>
<td>Textual</td>
<td>Tue, Tuesday</td>
</tr>
<tr>
<td>a</td>
<td>AM/PM marker</td>
<td>Textual</td>
<td>PM</td>
</tr>
<tr>
<td>K</td>
<td>Hour in AM/PM (0-11)</td>
<td>Numeric</td>
<td>0</td>
</tr>
<tr>
<td>'</td>
<td>Escape for text</td>
<td>Delimiter</td>
<td>'</td>
</tr>
</tbody>
</table>
**Security Policies**

Security policies are settings related to the security of Taleo Enterprise applications.

Security policy settings are organized into four groups:

- Sign in
- User Accounts
- Password
- Forgot password

For details on each setting, see *Security Policy Settings*.

The History section provides information on actions performed on security policy settings such as the date and time, a description and details on the action, as well as the “actor” (person or system) who performed the action.

### Security Policy Settings

<table>
<thead>
<tr>
<th>Security Policy - Sign In Setting</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display the link &quot;Forgot your password?&quot;</td>
<td>Yes (default), No. When Yes is selected, the Forgot your Password link is displayed in the Sign In page.</td>
<td>Configuration &gt; [Security] Security Policies</td>
</tr>
<tr>
<td>Show the legal agreement to users at login.</td>
<td>Yes, No (default).</td>
<td>Configuration &gt; [Security] Security Policies</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Security Policy - User Account Setting</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of incorrect sign-in attempts allowed per user before his/her account is locked</td>
<td>Unlimited, 3 (default), 5, 10, 15, 20, 100. Determines the maximum number of times a user can enter incorrect information during sign-in before the user’s account is locked.</td>
<td>Configuration &gt; [Security] Security Policies</td>
</tr>
<tr>
<td>Period during which the system prevents access to an account that has been locked</td>
<td>Permanent (default); 2, 5, 10, 15 minutes; 1, 4 hours; 1 day; 1 week; 30 days.</td>
<td>Configuration &gt; [Security] Security Policies</td>
</tr>
<tr>
<td>When creating a user account, send an email to user to confirm registration and password.</td>
<td>Yes, No (default).</td>
<td>Configuration &gt; [Security] Security Policies</td>
</tr>
<tr>
<td>When creating a user account, generate automatically a user name.</td>
<td>Yes, No (default).</td>
<td>Configuration &gt; [Security] Security Policies</td>
</tr>
</tbody>
</table>

---

<table>
<thead>
<tr>
<th>Date Format Syntax</th>
<th>Meaning</th>
<th>Presentation</th>
<th>Example (US locale)</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;&quot;</td>
<td>Single quotation mark (twice the escape character)</td>
<td>Literal</td>
<td></td>
</tr>
<tr>
<td>Security Policy - Password Setting</td>
<td>Description</td>
<td>Location</td>
<td></td>
</tr>
<tr>
<td>------------------------------------</td>
<td>-------------</td>
<td>----------</td>
<td></td>
</tr>
<tr>
<td>Allow a password to be valid for X days (leave the field empty if you want passwords to be always valid)</td>
<td>Number of days before a user must change his/her password. Putting no values means that the password is always valid.</td>
<td>Configuration &gt; [Security] Security Policies</td>
<td></td>
</tr>
<tr>
<td>When a password change is required, prevent the reuse of the previous X passwords</td>
<td>Number of password changes required before a user can use a password that he/she has used previously. Putting 0 means that the feature is disabled. 0 (default value).</td>
<td>Configuration &gt; [Security] Security Policies</td>
<td></td>
</tr>
<tr>
<td>Require passwords that contain at least X characters</td>
<td>6 to 20.</td>
<td>Configuration &gt; [Security] Security Policies</td>
<td></td>
</tr>
<tr>
<td>Require passwords that contain no more than X characters</td>
<td>6 to 50. The system will start counting the number of characters from the maximum number of characters selected in the setting “Require passwords that contain at least x characters”. For example, if you selected 10 characters, the system will indicate a possible value between 10 and 50.</td>
<td>Configuration &gt; [Security] Security Policies</td>
<td></td>
</tr>
<tr>
<td>Require passwords that contain at least X letters of the Roman alphabet</td>
<td>0 to 20. The number of characters cannot exceed the number indicated in the setting “Require passwords that contain at least x characters”.</td>
<td>Configuration &gt; [Security] Security Policies</td>
<td></td>
</tr>
<tr>
<td>Require passwords that contain at least X lowercase letters of the Roman alphabet</td>
<td>0 to 20. The number of characters cannot exceed the number indicated in the setting “Require passwords that contain at least x characters”.</td>
<td>Configuration &gt; [Security] Security Policies</td>
<td></td>
</tr>
<tr>
<td>Require passwords that contain at least X uppercase letters of the Roman alphabet</td>
<td>0 to 20. The number of characters cannot exceed the number indicated in the setting “Require passwords that contain at least x characters”.</td>
<td>Configuration &gt; [Security] Security Policies</td>
<td></td>
</tr>
<tr>
<td>Require passwords that contain at least X numeric characters</td>
<td>0 to 20. The number of characters cannot exceed the number indicated in the setting “Require passwords that contain at least x characters”.</td>
<td>Configuration &gt; [Security] Security Policies</td>
<td></td>
</tr>
<tr>
<td>Require passwords that contain at least X characters other than letters and numbers (! # $ % &amp; ( ) * + , - . / : ; &lt; = &gt; ? @ [ ] ^ _ ` {</td>
<td>} ~)</td>
<td>0 to 20. The number of characters cannot exceed the number indicated in the setting “Require passwords that contain at least x characters”.</td>
<td>Configuration &gt; [Security] Security Policies</td>
</tr>
<tr>
<td>Require passwords that contain no more than X identical consecutive characters</td>
<td>2, 3, 4, 5. The number of characters cannot exceed the number indicated in the setting “Require passwords that contain at least x characters”.</td>
<td>Configuration &gt; [Security] Security Policies</td>
<td></td>
</tr>
<tr>
<td>Require passwords that do not contain the user's first name</td>
<td>Yes, No (default).</td>
<td>Configuration &gt; [Security] Security Policies</td>
<td></td>
</tr>
<tr>
<td>Require passwords that do not contain the user's last name</td>
<td>Yes, No (default).</td>
<td>Configuration &gt; [Security] Security Policies</td>
<td></td>
</tr>
</tbody>
</table>
### Security Policy - Password Setting

| Require passwords that do not contain the corresponding user name | Yes (default), No. | Configuration > [Security] Security Policies |
| Require passwords that do not contain the user's email address | Yes, No (default). | Configuration > [Security] Security Policies |

### Security Policy - Forget Password Setting

| Use this method to change passwords | There are several options for users to recover their password. It can be via an access code, security questions, or by contacting the system administrator. For details on each of the option, see Details regarding the "Use this method to change passwords" setting. | Configuration > [Security] Security Policies |
| Number of incorrect attempts allowed per user to enter the email address | 3, 5 | Configuration > [Security] Security Policies |
| Lock a user’s account when the number of incorrect attempts allowed to enter the email address is exceeded | Yes, No. | Configuration > [Security] Security Policies |

### Details regarding the “Use this method to change passwords” setting

The change password procedure contains six options of authentication:

<table>
<thead>
<tr>
<th>Options of the “Use this method to change passwords” Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Access Code</strong></td>
<td>An email containing an access code is sent to the user once the user has confirmed his/her email address.</td>
</tr>
<tr>
<td><strong>Security Questions</strong></td>
<td>The user is asked to answer the security questions (from 1 to 3) previously entered in his/her profile. If the answer is correct, the user is invited to enter a new password.</td>
</tr>
<tr>
<td><strong>Security Questions and Access Code</strong></td>
<td>The user is asked to answer the security questions (from 1 to 3) previously entered in his/her profile. If the answer is correct, an email containing an access code is sent to the user once the user has confirmed his/her email address.</td>
</tr>
<tr>
<td><strong>Security Questions or Access Code</strong></td>
<td>The user is asked to answer the security questions (from 1 to 3) previously entered in his/her profile. If the answer is correct and the user has an email address, an access code is sent to the user once the user has confirmed his/her email address. If the user does not have an email address and the answer to the security question is correct, the access is granted to the application and the user is invited to change his/her password.</td>
</tr>
<tr>
<td><strong>Security Questions and/or Access Code</strong></td>
<td>When this option is activated, one of the following situation will happen. See the Security Questions and/or Access Code Option section.</td>
</tr>
<tr>
<td>Options of the “Use this method to change passwords” Setting</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------------------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Contact System Administrator</td>
<td>The user is asked to contact the system administrator. Only the system administrator can then generate a new password and communicate it to the user.</td>
</tr>
</tbody>
</table>

Details regarding the “Security Question and/or Access Code” option

The change password procedure contains six options of authentication:

<table>
<thead>
<tr>
<th>The user has an email address</th>
<th>Security questions were activated</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>Yes</td>
<td>The user will have to answer the security questions correctly and an access code will be emailed.</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>The user will receive an access code by email.</td>
</tr>
<tr>
<td>No</td>
<td>Yes</td>
<td>The user will have to answer the security questions correctly to be able to access the application.</td>
</tr>
<tr>
<td>No</td>
<td>No</td>
<td>The user will be asked to contact the technical support.</td>
</tr>
</tbody>
</table>

Configuring Security Policies

**Prerequisite**

The Manage security policies user type permission is required.

*Configuration > Security Policies*

**Steps**

1. In the Security Policies page, click Edit next to a topic.
2. In the Editor page, select a value for each required setting.
3. Click Save.

Legal Agreement

A legal agreement is a disclaimer text activated by system administrators and displayed to users when accessing a Taleo solution.

Taleo customers can create a legal agreement that users must agree to abide by before they can log into Taleo products that use SmartOrg for login purposes. The text of such agreements typically reminds all users that the computers they are accessing are government or private industry owned and must be used in accordance with good security practices.

System administrators are responsible of entering the disclaimer text either by typing the text or by pasting it from another source, of formatting the text using HTML features such as bold, italic, color, font type and size, images, etc, and of activating the text so it is displayed to users when accessing a Taleo solution (except the Career Section).

Taleo customers can create any number of legal agreements and change the currently active agreement at any time, however, only one agreement can be active at a time. The system will display the active legal agreement to users if the legal agreement setting was activated.
If the legal agreement feature is implemented, pages are typically displayed to users in the following order:

- Taleo product list page
- Legal Agreement page
- User Sign In page

If customers prefer that users be authenticated as the first step, they can request Taleo to change the sequence, in which case the Taleo product list page is "protected" and pages are displayed in the following order:

- Legal Agreement page
- User Sign In page
- Taleo product list page

Creating a Legal Agreement

Prerequisite
The Manage legal agreements user type permission is required.

Configuration > Legal Agreements

Steps
1. Click Create.
2. Complete fields as required.
3. Apply formatting to the text to organize information, facilitate readability and draw attention to particular passages.
4. Click Save.

Activating a Legal Agreement

Prerequisite
The Manage legal agreements user type permission is required.

Only one legal agreement can be activated at a time.

The legal agreement must be deactivated or draft.

Configuration > Legal Agreements

Steps
1. Click the name of a legal agreement.
2. Click Activate next to Properties.

Result
The activated legal agreement is displayed to users in Taleo solutions if the Show the legal agreement to users at login security policy is set to Yes.

Showing the Legal Agreement to Users at Login

Prerequisite
The Manager security policies user type permission is required.

Configuration > Security Policies
Steps
1. Click Edit next to Sign In.
2. Select Yes for the *Show the legal agreements to users at login* option.
3. Click Save.

Modifying a Legal Agreement

**Prerequisite**
The *Manage legal agreements* user type permission is required.

*Configuration > Legal Agreements*

**Steps**
1. Click a legal agreement.
2. Click Edit next to properties.
3. Modify fields as required.
4. Click Save.

Deleting a Legal Agreement

**Prerequisite**
The legal agreement must be active.

The *Manage legal agreements* user type permission is required.

*Configuration > Legal Agreements*

**Steps**
1. Click Delete next to the agreement.
2. Answer Yes to the message that appears.

**Result**
The legal agreement is permanently deleted from the database. If the legal agreement was active, it will no longer be displayed to users when signing in a Taleo solution.

Deactivating a Legal Agreement

**Prerequisite**
The *Manage legal agreements* user type permission is required.
The legal agreement must be active.

*Configuration > Legal Agreement*

**Steps**
1. Click on the name of a legal agreement.
2. Click Deactivate next to Properties.

**Result**
The deactivated legal agreement is no longer displayed when users sign in a Taleo solution.
Hiding the Legal Agreement to Users at Login

Prerequisite
The *Manager security policies* user type permission is required.

*Configuration > Security Policies*

Steps
1. Click Edit next to Sign In.
2. Select No for the *Show the legal agreements to users at login* setting.
3. Click Save.

Security Message Templates

Security message templates are messages relating to the security of Taleo Enterprise products. They are provided by Taleo.

Security message templates are located in the Configuration menu, under Security. For a list of message templates, see *Message Templates Related to Security*. System administrators can change the languages available and the wording of messages. They cannot create new message templates.

Configuration

To create and edit security message templates in the Configuration menu, the *Manage Message Templates for email correspondence and reminders* permission is required.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage message templates for email correspondence and reminders</td>
<td><em>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Configuration &gt; Security Management</em></td>
</tr>
</tbody>
</table>

Message Templates Related to Security

Message templates related to security are located in the Configuration menu, under Security.

<table>
<thead>
<tr>
<th>Message Template</th>
<th>Description</th>
<th>Recipient</th>
<th>To Field Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forgot Password</td>
<td>Indicates that the password change request was received and provides the user the access code needed to change his/her password.</td>
<td>User account email address (user trying to do a forgot password).</td>
<td><code>{Other.UserEmail}</code></td>
</tr>
<tr>
<td>Password Change Instructions</td>
<td>Indicates that the password change request was received and provides a step-by-step procedure on</td>
<td>User account email address (user trying to do a forgot password).</td>
<td><code>{Other.UserEmail}</code></td>
</tr>
<tr>
<td>Message Template</td>
<td>Description</td>
<td>Recipient</td>
<td>To Field Content</td>
</tr>
<tr>
<td>------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-----------------------------------------------------</td>
<td>----------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Password Change Request</td>
<td>Indicates to send a new password to a user that was unable to answer his/her password change questions, or did not remember his/her password and had not yet specified questions.</td>
<td>Not define by default. Define by the customer. (Email probably sent to an administrator).</td>
<td>PLEASE ENTER A VALID EMAIL ADDRESS</td>
</tr>
<tr>
<td>Standard Notification for a Successful Network Data Synchronization</td>
<td>Indicates that the synchronization of a specific element with the network database was successfully completed.</td>
<td>Logged user email address (user who requested the synchronization task).</td>
<td>{NdaSynchronizationInfoFields.emailAddress}</td>
</tr>
<tr>
<td>Standard Notification for an Unsuccessful Network Data Synchronization</td>
<td>Indicates that the communication with the network database could not be established and that the synchronization of a specific element could not be executed.</td>
<td>Logged user email address (user who requested the synchronization task).</td>
<td>{NdaSynchronizationInfoFields.emailAddress}</td>
</tr>
<tr>
<td>Standard notification - User Account Information</td>
<td>Provides information on how to log into the application (user name, access code, URL address).</td>
<td>User account email address (user on which the action is done).</td>
<td>{AccountCreationFields.EmailAddress}</td>
</tr>
<tr>
<td>Standard notification for a candidate account confirmation</td>
<td>Indicates that a candidate account was created and how to log into the application (user name, access code, URL address).</td>
<td>User account email address (user on which the action is done).</td>
<td>{AccountCreationFields.EmailAddress}</td>
</tr>
<tr>
<td>Standard notification for a Password Reset</td>
<td>Indicates that the user password was reset and how to specify a new password.</td>
<td>User account email address (user on which the action is done).</td>
<td>{PasswordResetInfoFields.EmailAddress}</td>
</tr>
<tr>
<td>Standard notification for a registration</td>
<td>Indicates that an account was created and how to access it using a user name and access code.</td>
<td>User account email address (user on which the action is done).</td>
<td>{AccountCreationFields.EmailAddress}</td>
</tr>
</tbody>
</table>
Network Data

Network Data Management

Network data management gives system administrators limited control over network data elements.

Network data elements are data common to all Taleo products. With network data management, system administrators can activate, deactivate, filter, and synchronize network data elements within four network data element categories: certifications, employers, institutions, and programs. The values within each category constitute the network data elements.

Data element synchronization is done between the customer's database and NDA central, the master data repository.

Example:

For example, the Employer network data category contains a list of all the companies in the Taleo master data repository. These companies are network data elements. A system administrator can activate, deactivate, filter, and synchronize some or all of the companies.

Configuration

The user must have the following user type permission:

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Foundation Data</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types</td>
</tr>
</tbody>
</table>

Activating All Network Data Elements

Prerequisite

You must have the Manage Foundation Data user type permission at Configuration [SmartOrg] Administration [Users] User Types.

This task applies to activating certification, employer, institution, and program network data elements.

Configuration > [SmartOrg] Administration > [Network Data] Certifications/Employers/Institutions/Programs

Steps

1. Filter list if necessary.
2. Click Activate All.
3. Click Yes.

Result

The status of all network data elements in the list changes to Active.

All network data elements are added to the respective list in Taleo Recruiting, Taleo Performance, and Taleo Onboarding.
Activating a Network Data Element

Prerequisite
You must have the Manage Foundation Data user type permission at Configuration [SmartOrg] Administration [Users] User Types.

The status of the network data element must be Inactive.
This task applies to activating certification, employer, institution, and program network data elements.

Steps
Click Activate in the Actions column of the network data element you want to activate.

Result
The status of the network data element changes to Active.
The activated network data element is added to the respective list in Taleo Recruiting, Taleo Performance, and Taleo Onboarding.

Deactivating All Network Data Elements

Prerequisite
You must have the Manage Foundation Data user type permission at Configuration [SmartOrg] Administration [Users] User Types.

This task applies to deactivating certification, employer, institution, and program network data elements.

Steps
1. Filter list if necessary.
2. Click Deactivate All.
3. Click Yes.

Result
The status of all network data elements in the list changes to Inactive.
All network data elements are removed from the respective list in Taleo Recruiting, Taleo Performance, and Taleo Onboarding.
Data elements in lists that were selected before the element was deactivated remain selected.

Deactivating a Network Data Element

Prerequisite
You must have the Manage Foundation Data user type permission at Configuration [SmartOrg] Administration [Users] User Types.

The status of the network data element must be Active.
This task applies to deactivating certification, employer, institution, and program network data elements.

**Configuration > [SmartOrg] Administration > [Network Data] Certifications/Employers/Institutions/Programs**

**Steps**

Click **Deactivate** in the Actions column of the network data element you want to deactivate.

**Result**

The status of the network data element changes to Inactive.

The deactivated network data element is removed from the respective list in Taleo Recruiting, Taleo Performance, and Taleo Onboarding.

Data elements in lists that were selected before the element was deactivated remain selected.

**Filtering Network Data Elements**

**Prerequisite**

You must have the *Manage Foundation Data* user type permission at **Configuration > [SmartOrg] Administration > [Users] User Types**.

This task applies to filtering certification, employer, institution, and program network data elements.

**Steps**

1. Select an item in the Refine by list.
   
   The Creation Date is the date the network data element was added to the NDA central database.
   
   If you filter by Creation Date, click the date and use the calendar to select a specific date. Network data elements created as of the specified date will be listed.

2. Click **Refresh**.

**Result**

The filtered items are listed.

**Synchronizing the Database with the NDA Central Database**

**Prerequisite**

You must have the *Manage Foundation Data* user type permission at **Configuration > [SmartOrg] Administration > [Users] User Types**.

This task applies to synchronizing certification, employer, institution, and program network data elements.

**Steps**

1. Click **Synchronize**.

2. Click **OK**.

**Result**

An email is sent to you when the synchronization is complete.
When synchronizing institutions, RS Locations are also synchronized because institutions are associated to RS Locations.
Deep Linking

Oracle Supports certain URLs that provide a direct access to Taleo products. Taleo also supports certain URLs to get access to specific actions within a Taleo product.

Users can click on a hyperlink in an email, portal or other environments outside Taleo's application and navigate directly to a screen in the application.

Using the deep linking feature, system administrators can provide URLs to users that directly place the users on the Recruiting Center home page, directly into the create requisition process, or directly into a specific job requisition or candidate file.

If single sign-on (SSO) is used, users are directed directly where the URL points to, without having to go through the User Sign In page. If SSO is not used, users are first prompted to enter their credentials in the User Sign In page before being able to access the page defined by the URL.

To create a URL that directs users to a specific action, specific parameters are required. For example, the following URL directs users to a specific requisition:

https://taleo.taleo.net/enterprise/publicurl/viewRequisition?requisitionNumber=8765&language=en

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;Product URL&gt;</td>
<td>Taleo product identifier URL.</td>
<td>taleo.taleo.net</td>
</tr>
<tr>
<td>&lt;action&gt;</td>
<td>Action available for the product.</td>
<td>viewRequisition</td>
</tr>
<tr>
<td>&lt;parameter1&gt;</td>
<td>Parameter identifier.</td>
<td>requisitionNumber</td>
</tr>
<tr>
<td>&lt;value1&gt;</td>
<td>Key value.</td>
<td>8765</td>
</tr>
<tr>
<td>&lt;parameter2&gt;</td>
<td>Language (fixed string).</td>
<td>language</td>
</tr>
<tr>
<td>&lt;value2&gt;</td>
<td>Language for users to view the page. If no language is specified, the browser language is used. If no language is specified by the browser, the default language used is English.</td>
<td>en</td>
</tr>
</tbody>
</table>

System administrators should evaluate how users are using the product. If specific URLs are appropriate for some audiences, they should implement them to provide easier product or action access.

Supported Product URLs

Oracle supports certain URLs that provide a direct access to Taleo products.

Change the "client.taleo.net" with the actual zone name.

| Supported Product URLs | Central Configuration |
### Supported Product URLs

<table>
<thead>
<tr>
<th>URL</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="https://client.taleo.net/smartorg/index.jsf">https://client.taleo.net/smartorg/index.jsf</a></td>
<td>Note: Users are redirected to the central configuration menu.</td>
</tr>
<tr>
<td><a href="https://client.taleo.net/smartorg/smartorg/common/toc.jsf">https://client.taleo.net/smartorg/smartorg/common/toc.jsf</a></td>
<td>Table of Contents page</td>
</tr>
<tr>
<td><a href="https://client.taleo.net/smartorg/sam/accessmanagement/globalLogout.jsf">https://client.taleo.net/smartorg/sam/accessmanagement/globalLogout.jsf</a></td>
<td>Sign Out</td>
</tr>
<tr>
<td><a href="https://client.taleo.net/enterprise/enterprise/flex.jsf">https://client.taleo.net/enterprise/enterprise/flex.jsf</a></td>
<td>Recruiting Center - Home Page</td>
</tr>
<tr>
<td><a href="https://client.taleo.net/careersection/x/jobsearch.ftl?lang=en">https://client.taleo.net/careersection/x/jobsearch.ftl?lang=en</a></td>
<td>Career Section - Internal</td>
</tr>
<tr>
<td><a href="https://client.taleo.net/careersection/">https://client.taleo.net/careersection/</a>&lt;cs_no&gt;/jobapply.ftl?lang=&lt;language&gt;&amp;job=&lt;contest_no_OR_req_id&gt;</td>
<td>Career Section - Job Application</td>
</tr>
<tr>
<td><a href="https://client.taleo.net/careersection/">https://client.taleo.net/careersection/</a>&lt;cs_no&gt;/jobdetail.ftl?lang=&lt;language&gt;&amp;job=&lt;contest_no_OR_req_id&gt;</td>
<td>Career Section - Job Details</td>
</tr>
<tr>
<td><a href="https://client.taleo.net/careersection/">https://client.taleo.net/careersection/</a>&lt;cs_no&gt;/jobrefer.ftl?lang=&lt;language&gt;&amp;job=&lt;contest_no_OR_req_id&gt;</td>
<td>Career Section - Job Referral</td>
</tr>
<tr>
<td><a href="https://client.taleo.net/careersection/">https://client.taleo.net/careersection/</a>&lt;url code&gt;/jobsearch.ftl?lang=&lt;language&gt;&amp;urgent=&lt;true&gt;</td>
<td>Career Section - Urgent Jobs Only</td>
</tr>
<tr>
<td><a href="https://client.taleo.net/careersection/">https://client.taleo.net/careersection/</a>&lt;url code&gt;/jobsearch.ftl?lang=&lt;language&gt;&amp;location=&lt;location’s ID&gt;</td>
<td>Career Section - OLF Criteria</td>
</tr>
<tr>
<td><a href="https://client.taleo.net/careersection/">https://client.taleo.net/careersection/</a>&lt;url code&gt;/jobsearch.ftl?lang=&lt;language&gt;&amp;organization =&lt;organization’s ID&gt;</td>
<td></td>
</tr>
<tr>
<td><a href="https://client.taleo.net/careersection/">https://client.taleo.net/careersection/</a>&lt;url code&gt;/jobsearch.ftl?lang=&lt;language&gt;&amp;jobfield=&lt;job field’s ID&gt;</td>
<td></td>
</tr>
<tr>
<td><a href="https://client.taleo.net/careersection/">https://client.taleo.net/careersection/</a>&lt;url code&gt;/jobsearch.ftl?lang=&lt;language&gt;&amp;jobfield=&lt;job field’s ID&gt;</td>
<td>Career Section - Keyword</td>
</tr>
<tr>
<td>Supported Product URLs</td>
<td></td>
</tr>
<tr>
<td>---------------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td><a href="https://client.taleo.net/careersection/">https://client.taleo.net/careersection/</a>&lt;url code&gt;/jobsearch.ftl?lang=&lt;language&gt;&amp;keyword=&lt;keyword criteria&gt;</td>
<td></td>
</tr>
<tr>
<td><strong>Career Section - Expanded Search Panel</strong></td>
<td></td>
</tr>
<tr>
<td><a href="https://client.taleo.net/careersection/">https://client.taleo.net/careersection/</a>&lt;url code&gt;/jobsearch.ftl?lang=&lt;language&gt;&amp;searchExpanded=true or false</td>
<td></td>
</tr>
<tr>
<td><strong>Career Section - Radius Search</strong></td>
<td></td>
</tr>
<tr>
<td><a href="https://client.taleo.net/careersection/">https://client.taleo.net/careersection/</a>&lt;url code&gt;/jobsearch.ftl?lang=&lt;language&gt;&amp;radiusType&lt;K or M, for metric/imperial&gt;&amp;radius=&lt;radius value&gt;&amp;locationRad=&lt;ID of the location used for radius search&gt;</td>
<td></td>
</tr>
<tr>
<td><strong>Career Section - Study Level</strong></td>
<td></td>
</tr>
<tr>
<td><a href="https://client.taleo.net/careersection/">https://client.taleo.net/careersection/</a>&lt;url code&gt;/moresearch.ftl?lang=&lt;language&gt;&amp;studylevel=&lt;ID&gt;</td>
<td></td>
</tr>
<tr>
<td><strong>Career Section - Employee Status</strong></td>
<td></td>
</tr>
<tr>
<td><a href="https://client.taleo.net/careersection/">https://client.taleo.net/careersection/</a>&lt;url code&gt;/moresearch.ftl?lang=&lt;language&gt;&amp;employeestatus=&lt;ID&gt;</td>
<td></td>
</tr>
<tr>
<td><strong>Career Section - Schedule</strong></td>
<td></td>
</tr>
<tr>
<td><a href="https://client.taleo.net/careersection/">https://client.taleo.net/careersection/</a>&lt;url code&gt;/moresearch.ftl?lang=&lt;language&gt;&amp;jobschedule=&lt;ID&gt;</td>
<td></td>
</tr>
<tr>
<td><strong>Career Section - Will Travel</strong></td>
<td></td>
</tr>
<tr>
<td><a href="https://client.taleo.net/careersection/">https://client.taleo.net/careersection/</a>&lt;url code&gt;/moresearch.ftl?lang=&lt;language&gt;&amp;travel=&lt;ID&gt;</td>
<td></td>
</tr>
<tr>
<td><strong>Career Section - Job Type</strong></td>
<td></td>
</tr>
<tr>
<td><a href="https://client.taleo.net/careersection/">https://client.taleo.net/careersection/</a>&lt;url code&gt;/moresearch.ftl?lang=&lt;language&gt;&amp;jobtype=&lt;ID&gt;</td>
<td></td>
</tr>
<tr>
<td><strong>Career Section - Shift</strong></td>
<td></td>
</tr>
<tr>
<td><a href="https://client.taleo.net/careersection/">https://client.taleo.net/careersection/</a>&lt;url code&gt;/moresearch.ftl?lang=&lt;language&gt;&amp;jobshift=&lt;ID&gt;</td>
<td></td>
</tr>
<tr>
<td><strong>Career Section - Job Level</strong></td>
<td></td>
</tr>
<tr>
<td><a href="https://client.taleo.net/careersection/">https://client.taleo.net/careersection/</a>&lt;url code&gt;/moresearch.ftl?lang=&lt;language&gt;&amp;joblevel=&lt;ID&gt;</td>
<td></td>
</tr>
<tr>
<td><strong>Onboarding - New Hire Portal</strong></td>
<td></td>
</tr>
<tr>
<td><a href="https://client.taleo.net/newhireportal/index.jsp">https://client.taleo.net/newhireportal/index.jsp</a></td>
<td></td>
</tr>
<tr>
<td><strong>Onboarding</strong></td>
<td></td>
</tr>
<tr>
<td><a href="https://client.taleo.net/onboarding/index.jsf">https://client.taleo.net/onboarding/index.jsf</a></td>
<td></td>
</tr>
<tr>
<td><strong>Transitions</strong></td>
<td></td>
</tr>
<tr>
<td><a href="https://client.taleo.net/transition/index.jsf">https://client.taleo.net/transition/index.jsf</a></td>
<td></td>
</tr>
<tr>
<td><strong>Taleo Scheduling Center</strong></td>
<td></td>
</tr>
<tr>
<td><a href="https://TSC.taleo.net/zoneuser/mainMenu.action">https://TSC.taleo.net/zoneuser/mainMenu.action</a></td>
<td></td>
</tr>
<tr>
<td><strong>Performance</strong></td>
<td></td>
</tr>
</tbody>
</table>
## Supported Product URLs

<table>
<thead>
<tr>
<th>Supported Product URLs</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="https://client.taleo.net/orion/flex.jsf?lang=en">https://client.taleo.net/orion/flex.jsf?lang=en</a></td>
</tr>
</tbody>
</table>

## Supported Action URLs

Oracle supports certain URLs to get access to specific actions within a Taleo product.

<table>
<thead>
<tr>
<th>Supported Action URLs</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Create a requisition</strong></td>
</tr>
<tr>
<td><a href="http://client.taleo.net/enterprise/publicurl/createRequisition">http://client.taleo.net/enterprise/publicurl/createRequisition</a></td>
</tr>
<tr>
<td><strong>Open a specific requisition</strong></td>
</tr>
<tr>
<td><a href="http://client.taleo.net/enterprise/publicurl/viewRequisition?requisitionNumber=8765">http://client.taleo.net/enterprise/publicurl/viewRequisition?requisitionNumber=8765</a></td>
</tr>
<tr>
<td>Note: Instead of requisitionNumber you can also specify the contest number: <a href="http://client.taleo.net/enterprise/publicurl/viewRequisition?contestNumber=TOR0000334">http://client.taleo.net/enterprise/publicurl/viewRequisition?contestNumber=TOR0000334</a></td>
</tr>
<tr>
<td><strong>Open a candidate list specific to a requisition</strong></td>
</tr>
<tr>
<td><a href="http://client.taleo.net/enterprise/publicurl/viewCandidates?requisitionNumber=8765">http://client.taleo.net/enterprise/publicurl/viewCandidates?requisitionNumber=8765</a></td>
</tr>
<tr>
<td><strong>Open a candidate file</strong></td>
</tr>
<tr>
<td><a href="http://client.taleo.net/enterprise/publicurl/viewProfile?candidateNumber=5159">http://client.taleo.net/enterprise/publicurl/viewProfile?candidateNumber=5159</a></td>
</tr>
<tr>
<td><strong>Open a candidate submission</strong></td>
</tr>
<tr>
<td><a href="http://client.taleo.net/enterprise/publicurl/viewApplication?applicationNumber=35097">http://client.taleo.net/enterprise/publicurl/viewApplication?applicationNumber=35097</a></td>
</tr>
<tr>
<td><strong>Open a candidate list for managers</strong></td>
</tr>
<tr>
<td><a href="http://client.taleo.net/enterprise/publicurl/viewRequisitions">http://client.taleo.net/enterprise/publicurl/viewRequisitions</a></td>
</tr>
<tr>
<td><strong>View an offer</strong></td>
</tr>
<tr>
<td><a href="http://client.taleo.net/enterprise/publicurl/viewOffer?offerNumber=15066">http://client.taleo.net/enterprise/publicurl/viewOffer?offerNumber=15066</a></td>
</tr>
<tr>
<td><strong>View recruiting tasks</strong></td>
</tr>
<tr>
<td><a href="http://client.taleo.net/enterprise/publicurl/tasks">http://client.taleo.net/enterprise/publicurl/tasks</a></td>
</tr>
<tr>
<td><strong>Approve a requisition</strong></td>
</tr>
<tr>
<td><a href="http://client.taleo.net/enterprise/publicurl/tasks?type=approveRequisition&amp;requisitionNumber=7317">http://client.taleo.net/enterprise/publicurl/tasks?type=approveRequisition&amp;requisitionNumber=7317</a></td>
</tr>
<tr>
<td><strong>Approve an offer</strong></td>
</tr>
<tr>
<td><a href="http://client.taleo.net/enterprise/publicurl/tasks?type=approveOffer&amp;offerNumber=18787">http://client.taleo.net/enterprise/publicurl/tasks?type=approveOffer&amp;offerNumber=18787</a></td>
</tr>
<tr>
<td><strong>Extend an offer</strong></td>
</tr>
<tr>
<td><a href="http://client.taleo.net/enterprise/publicurl/tasks?type=extendOffer&amp;offerNumber=15066">http://client.taleo.net/enterprise/publicurl/tasks?type=extendOffer&amp;offerNumber=15066</a></td>
</tr>
<tr>
<td><strong>Extend posting</strong></td>
</tr>
<tr>
<td><a href="http://client.taleo.net/enterprise/publicurl/tasks?type=posting&amp;requisitionNumber=8178">http://client.taleo.net/enterprise/publicurl/tasks?type=posting&amp;requisitionNumber=8178</a></td>
</tr>
<tr>
<td>Supported Action URLs</td>
</tr>
<tr>
<td>--------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Amend an approval path</strong></td>
</tr>
<tr>
<td><a href="http://client.taleo.net/enterprise/publicurl/tasks?type=amendApprovalPath&amp;requisitionNumber=7498">http://client.taleo.net/enterprise/publicurl/tasks?type=amendApprovalPath&amp;requisitionNumber=7498</a></td>
</tr>
<tr>
<td><strong>Finalize start date</strong></td>
</tr>
<tr>
<td><a href="http://client.taleo.net/enterprise/publicurl/tasks?type=finalizeStartDate&amp;offerNumber=10437">http://client.taleo.net/enterprise/publicurl/tasks?type=finalizeStartDate&amp;offerNumber=10437</a></td>
</tr>
<tr>
<td><strong>Confirm employee presence</strong></td>
</tr>
<tr>
<td><a href="http://client.taleo.net/enterprise/publicurl/tasks?type=confirmEmployeePresence&amp;applicationNumber=7322">http://client.taleo.net/enterprise/publicurl/tasks?type=confirmEmployeePresence&amp;applicationNumber=7322</a></td>
</tr>
<tr>
<td><strong>Complete selection process</strong></td>
</tr>
<tr>
<td><a href="http://client.taleo.net/enterprise/publicurl/tasks?type=completeSelectionProcess&amp;applicationNumber=7347">http://client.taleo.net/enterprise/publicurl/tasks?type=completeSelectionProcess&amp;applicationNumber=7347</a></td>
</tr>
<tr>
<td><strong>Ready for sourcing</strong></td>
</tr>
<tr>
<td><a href="http://client.taleo.net/enterprise/publicurl/tasks?type=readyForSourcing&amp;requisitionNumber=5300">http://client.taleo.net/enterprise/publicurl/tasks?type=readyForSourcing&amp;requisitionNumber=5300</a></td>
</tr>
<tr>
<td><strong>Contribute</strong></td>
</tr>
<tr>
<td><a href="http://client.taleo.net/enterprise/publicurl/tasks?type=contribute&amp;requisitionNumber=7517">http://client.taleo.net/enterprise/publicurl/tasks?type=contribute&amp;requisitionNumber=7517</a></td>
</tr>
<tr>
<td><strong>Sourcing strategy to be defined</strong></td>
</tr>
<tr>
<td><a href="http://client.taleo.net/enterprise/publicurl/tasks?type=sourcingStrategyToBeDefined&amp;requisitionNumber=7537">http://client.taleo.net/enterprise/publicurl/tasks?type=sourcingStrategyToBeDefined&amp;requisitionNumber=7537</a></td>
</tr>
<tr>
<td><strong>To be completed</strong></td>
</tr>
<tr>
<td><a href="http://client.taleo.net/enterprise/publicurl/tasks?type=toBeCompleted&amp;requisitionNumber=7483">http://client.taleo.net/enterprise/publicurl/tasks?type=toBeCompleted&amp;requisitionNumber=7483</a></td>
</tr>
<tr>
<td><strong>To be filled</strong></td>
</tr>
<tr>
<td><a href="http://client.taleo.net/enterprise/publicurl/tasks?type=toBeFilled&amp;requisitionNumber=6477">http://client.taleo.net/enterprise/publicurl/tasks?type=toBeFilled&amp;requisitionNumber=6477</a></td>
</tr>
<tr>
<td><strong>Duplicate check</strong></td>
</tr>
<tr>
<td><a href="http://client.taleo.net/enterprise/publicurl/tasks?type=verify">http://client.taleo.net/enterprise/publicurl/tasks?type=verify</a></td>
</tr>
</tbody>
</table>
Configurable Employee Metrics

System administrators have the ability to define their own list of values for employee metrics used in the application.

Employee metrics can be configured in SmartOrg Administration under Configurable Metrics and used across the Taleo product suite. System administrators can manage the list of available values offered in the system for the following standard employee metrics:

- Employee Impact of Loss
- Employee Potential
- Promotability Readiness
- Reassignment Candidate
- Employee Risk of Loss

The following configuration capabilities are available:

- Creating, deleting, activating, and deactivating values.
- Reordering values.
- Changing the code and name of a value.
- Specifying a value as being the default value.
- Adding, modifying and removing the icon representing the value.

Creating a Configurable Metric Value

Prerequisite

Configuration > [SmartOrg] Administration > [Users] Configurable Metrics

Steps

1. Click a metric.
2. Click Create.
3. Provide a code and a name.
   The name is mandatory and multilingual. Set the name in every supported language.
4. Select the Default value check box if you want the value to be the default value for the metric.
   A default value is automatically set when an employee is created or modified.
5. Add a metric value icon.
6. The icon is optional. It allows providing a graphical representation of the metric value. Products that support this option may display the icon instead of the metric label or both.
7. Click Save.

Reordering Configurable Metric Values

Prerequisite

Configuration > [SmartOrg] Administration > [Users] Configurable Metrics
The display sequence is used to sort elements in the selection drop down when the employee is updated for a given metric.

**Steps**
1. Click a metric.
2. Click Reorder.
3. Select a value.
4. Click the Up/Down arrow to move the value.

### Activating a Configurable Metric Value

**Prerequisite**
To activate a metric value, its status must be Draft or Inactive.

*Configuration > [SmartOrg] Administration > [Users] Configurable Metrics*

**Steps**
1. Click a metric.
2. Locate the metric value you want to activate and click the corresponding Activate in the Actions column.

### Deactivating a Configurable Metric Value

**Prerequisite**
To deactivate a metric value, its status must be Active.

*Configuration > [SmartOrg] Administration > [Users] Configurable Metrics*

When a metric value is deactivated, products stop offering this value as a possible choice when updating an employee. However, it has no impact on employees being currently assessed on this value. Even if the value has been disabled, employees will still show this value until they are updated to another valid value.

**Steps**
1. Click a metric.
2. Locate the metric value you want to deactivate and click the corresponding Deactivate in the Actions column.

### Deleting a Configurable Metric Value

**Prerequisite**
A metric value can only be deleted if its status is Draft.

*Configuration > [SmartOrg] Administration > [Users] Configurable Metrics*

**Steps**
1. Click a metric.
2. Locate the metric value you want to delete and click the corresponding Delete in the Actions column.

### Employee Metrics Settings

Employee metric settings are used to configure how denormalized numerical scores are displayed in products.
Employee metric settings are available under Configuration > General Configuration > Settings.

<table>
<thead>
<tr>
<th>Employee Metrics Settings</th>
<th>Description</th>
<th>Default Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;Competency Rating&quot; Metric Rating Model</td>
<td>Indicates the rating model used to determine the available values for the &quot;Employee - Competency Rating&quot; metric.</td>
<td>Score</td>
</tr>
<tr>
<td>&quot;Goal Rating&quot; Metric Rating Model</td>
<td>Indicates the rating model used to determine the available values for the &quot;Employee - Goal Rating&quot; metric.</td>
<td>Score</td>
</tr>
<tr>
<td>&quot;Review Rating&quot; Metric Rating Model</td>
<td>Indicates the rating model used to determine the available values for the &quot;Employee – Review Rating&quot; metric.</td>
<td>Score</td>
</tr>
<tr>
<td>Metric Rating Display</td>
<td>Indicates the display format of rating values, based on a set of predefined formats.</td>
<td>In numeric format</td>
</tr>
<tr>
<td>Metric Rating Model Rounding</td>
<td>Indicates the rounding percentage used to determine the rating value corresponding to a given score.</td>
<td>50</td>
</tr>
</tbody>
</table>

Three employee metrics are using denormalized numerical scores:

- Review Rating
- Goal Rating
- Competency Rating

A numerical score can be represented in various forms:

- As a percentage (%).
- In numeric format (4).
- In numeric format with rating scale (4 [1,5]).
- In text format (Excellent).
- In text and numeric format (Excellent (4)).

The display format is determined by the Metric Rating Display setting.

- If the setting is 1, then the score is displayed directly as a percentage.
- If the setting is 2, 3, 4, or 5, a rating model must be provided. The Metric Rating Model Rounding also indicates how to round the value to fit within a value of the rating scale.
Deletion Tasks

Employee Information Deletion Task

System administrators use the employee information deletion task to permanently delete information related to former employees' employment at the organization (as might be required by law in EMEA and other regions).

The Person Model

The following "objects" in the Taleo system are associated with a person:

- User Account – to access the system with granted permissions.
- Candidate Account – to apply for jobs through the career section.
- Profile – to store the common profile. Employee and candidate share the same profile.
- Employee – to store employee-related data.

When candidates are hired, a user account and an employee associated with their profile are created:

- As an employee, the profile is maintained through Taleo Performance talent profile.
- As a candidate, the profile is maintained through Recruiting and the career section.

Employee Information Deletion Strategy

Employee information deletion task permanently deletes employee-specific data only.
The candidate account and common profile are unaffected. This enables a person to be rehired in the future by the organization. The person can remain in current pools and succession plans. The candidate account can eventually be deleted through a distinct task if Recruiting is available in the system.

<table>
<thead>
<tr>
<th>Deleted</th>
<th>Not Deleted</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee Specific Data</strong></td>
<td><strong>Other Taleo Performance Data</strong></td>
</tr>
<tr>
<td>• Employee Metrics</td>
<td>• Business Goals</td>
</tr>
<tr>
<td>• Pictures</td>
<td>• Projects</td>
</tr>
<tr>
<td>• Job History</td>
<td>• Sent Feedbacks</td>
</tr>
<tr>
<td>• Matrix Management</td>
<td>• History of actions taken by the employee</td>
</tr>
<tr>
<td>• Remaining Tasks</td>
<td><strong>Profile and Candidate Data</strong></td>
</tr>
<tr>
<td>• Compensation History</td>
<td>• General Profile (Education, Experience, Certifications, Preferences, etc)</td>
</tr>
<tr>
<td>• Goal Plans, Goals, Tasks (aligned goals will be unlinked)</td>
<td>• Job Submissions</td>
</tr>
<tr>
<td>• Performance Reviews &amp; Review History</td>
<td>• Offers</td>
</tr>
<tr>
<td>• Career Plans</td>
<td><strong>Talent Pools &amp; Succession Plans</strong></td>
</tr>
<tr>
<td>• Development Plans</td>
<td>• Remains as member (now as an external candidate)</td>
</tr>
<tr>
<td>• Received Feedbacks</td>
<td><strong>User Specific Data</strong></td>
</tr>
<tr>
<td>• Sent Feedback Requests</td>
<td>• Remains in the system but inactive</td>
</tr>
</tbody>
</table>

**Employee Information Deletion Rules**

Employee-related information can be permanently deleted provided all of the following conditions are met:

- The Employee Status of the user account is Former Employee (this is typically achieved by deleting the user account (status: Deleted)).
- The employee must not be the owner manager of positions. A transfer of ownership is required prior to deletion.
- The employee must not be the owner of talent pools. A transfer of ownership is required prior to deletion.

**Employee Information Deletion Process**

Employee information deletion is a four step process:

1. User account deletion (see Deleting a User Account From the User Account Page, Deleting the User Account of an Employee Using the Wizard and Deleting the User Account of an Employee Manually).
2. Deletion task creation (see Creating a Deletion Task).
3. Preview of employees to be deleted (see Previewing Employees to be Deleted).
4. Execution of the deletion task (manually or, more often, automatically according to the date and frequency chosen by the administrator).

**Limitations**

- No archiving capabilities at this time.
- A user account cannot be permanently deleted from the system.
  - User accounts, once deleted, are no longer displayed but remain in the system.
  - The user accounts do not contain employee-related data.
• Products for which the data will not be automatically deleted by the employee information deletion task:
  • Learn
  • Evaluation Management
  • Assessment
  • Passport
  • Talent Exchange
  • Analytics
  • Any other external products integrated with Taleo

Creating a Deletion Task

Prerequisite
The Access Deletion Tasks permission is required (User Types > [Functional Domains] Configuration > Data Lifecycle Management).

Configuration > Operations > Deletion Tasks

Steps
1. Click Create.
2. Select Employees, click Next.
3. Select Permanently delete, click Next.
4. Click the check box next to each criterion you want to include and click Next.
5. Enter values for the Name, Code, Status, Start Date, Recurrence fields and click Next.
6. Review your selections and click Finish.

Result
The task is displayed in the Tasks list. If you selected a date and frequency for the task, the task will run automatically on the dates that correspond to your selections.

Previewing Employees to be Deleted

Prerequisite
The Access Deletion Tasks permission is required (User Types > [Functional Domains] Configuration > Data Lifecycle Management).

Configuration > Operations > Deletion Tasks

Steps
1. In the Task list, click the task you want to examine.
2. Click Count.
3. Click the x out of y total items link to view the list of former employees to be deleted.
Foundation Data

- Organizations, Locations and Job Fields (OLF) ........................................................55
- Departments ................................................................................................................72
- Positions .....................................................................................................................77
Organizations, Locations and Job Fields (OLF)

**Fundamental Data Structure: Organization-Location-Job Field (OLF)**

Taleo designed a data structure that enables each customer to customize Taleo products such that they reflect how the customer does business. Taleo defines each organization (customer) as a combination of three main elements: Organizations, Locations, Job Fields (OLF). OLF is also referred to as contextualization.

**Organization** describes the hierarchical structure of an organization. Up to 20 organization levels can be created. The system proposes the following organization structure, but other terms may be chosen to better reflect the hierarchical structure of a company:

- Company
- Sector
- Department
- Division

**Location** represents a geographical area, such as a country or state. Locations are listed in a hierarchical order, from the broadest geographical area (often a country) to increasingly specific areas (work location). Up to 5 location levels can be created. Locations must be associated to Taleo network locations used for various purposes, mainly integration with external systems, using a common and standard universal structure. Taleo strongly recommends defining a zip code for the location. A common location structure is:

- Country
- State/Province
- Region
- City
- Work Location

**Job Field** represents the employment sectors or domains. Up to 4 job field levels can be created. Job fields must also be mapped to the network job fields, again to have a common language with the external world, be for posting or integrations. This mapping also serves to inherit existing classification for competencies. The system proposes the following job field structure, but other terms may be chosen to better reflect the structure of a company:

- Category
- Function
- Specialty

Contextualization, that is the Organization-Location-Job Field structure associated to an element, represents the framework the application uses to organize, classify, link, match or search for information in the application. Although Organization-Location-Job Field structures are configured with the help of an Oracle representative during the implementation phase, modifications to structure elements can be done in maintenance mode at any time. It is possible to customize the system to reflect a company's unique structure and make modifications to Organization-Location-Job field elements in real time so that the data accounts for any changes in the structure.

There are several key elements of the Taleo Enterprise products that are tied to the Organization-Location-Job field structure such as candidate selection workflows, requisitions and requisition templates, message templates, user management, prescreening, approvals, etc.

The purpose of contextualizing an element is to make the element relevant according to a specific context. Below is an example of contextualization with candidate selection workflows. The CSW1 would not be available to the user for this requisition, because the last level of its Location does not match that of the requisition. The CSW2
could be available to the user for this requisition. The parent element of the lowest level of the requisition for each dimension (Organization, Location or Field) must be the same as the lowest level of the workflow for each dimension.

<table>
<thead>
<tr>
<th>Requisition</th>
<th>Organization</th>
<th>Location</th>
<th>Job Field</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Urban transportation</td>
<td>United States/California/Los Angeles</td>
<td>Bus driver</td>
</tr>
<tr>
<td>CSW1</td>
<td>Urban transportation</td>
<td>United States/California/San Jose</td>
<td>Bus driver</td>
</tr>
<tr>
<td>CSW2</td>
<td>Urban transportation</td>
<td>United States</td>
<td>Bus driver</td>
</tr>
</tbody>
</table>

When using contextualization, the system applies the AND operator between Organizations, Locations and Job Fields entities. However, the OR operator is applied between elements of the same entity.

In the following example, a field would be displayed if Canada (or any of its children) AND Architecture were selected.

<table>
<thead>
<tr>
<th>Location</th>
<th>Canada</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Field</td>
<td>Architecture</td>
</tr>
</tbody>
</table>

In the following example, a field would be displayed if Canada AND Architecture were selected, or if United States AND Architecture were selected.

<table>
<thead>
<tr>
<th>Location</th>
<th>Canada</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>United States</td>
</tr>
<tr>
<td>Job Field</td>
<td>Architecture</td>
</tr>
</tbody>
</table>

**Configuration**

To manage organizations, locations and job fields in SmartOrg, the *Manage foundation data* permission is required.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage foundation data</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Configuration &gt; Foundation Data</td>
</tr>
</tbody>
</table>

**Mapping**

Mapping is essential to the Organization, Location, and Job Field (OLF) concept because it allows the creation of an association between a custom element and a standard element from an external system.

Through mapping, it is possible to organize and exchange data between two or more systems in a compatible format. Mapping locations, for example, helps the application to communicate location information to job boards when posting a requisition. The two systems agree that the data structure location will represent a geographical place such as a country, a state or a city. The systems are then able to swap information based on a mutually comprehensible data exchange agreement.
Structure Management

The Structure Editor lets you create and delete organization, location, and job field levels according to your organization's needs. The structure that you establish in the Structure Editor will form the basis of the Organizations, Locations, and Job Fields throughout the application.

Creating the Organization-Location-Job Field Structure

**Prerequisite**

The Manage Foundation Data user type permission is required.

The application must be in implementation mode or maintenance mode.

*Configuration > [SmartOrg] Administration*

**Steps**

1. Click Structure Management under Organizations, Locations or Job Fields.
2. Click Edit.
3. Click Create to add levels.
4. Enter a description for each level.
5. Translate the description into every supported content language.
6. In the Displayed column, select the levels that you want to display to the user.
   - For organizations and job fields, the levels must be displayed in sequence. For example, you can choose to display levels 1 to 3 and not 4, but you cannot display 1, 2, 4, but not 3.
7. Click Save.

Adding a Level to the Organization-Location-Job Field Structure

**Prerequisite**

The Manage Foundation Data user type permission is required.

The application must be in implementation mode or maintenance mode.

*Configuration > [SmartOrg] Administration*

**Steps**

1. Click Structure Management under Organizations, Locations or Job Fields.
2. Click Edit.
3. Click Create to add levels.
4. Enter a description for each level.
5. Translate the description into every supported content language.
6. In the Displayed column, select the levels that you want to display to the user.
   - The levels must be displayed in sequence. For example, you can choose to display levels 1 to 3 and not 4, but you cannot display 1, 2, 4, but not 3.
7. Click Save.
Editing a Level in the Organization-Location-Job Field Structure

**Prerequisite**

The *Manage Foundation Data* user type permission is required.

To edit the description of a level, the system must be in maintenance mode.

To edit which levels are displayed, the system must be in implementation mode or maintenance mode.

*Configuration > [SmartOrg] Administration*

**Steps**

1. Click Structure Management under Organizations, Locations or Job Fields.
2. Click Edit.
3. Make required changes.
4. Click Save.

Deleting a Level in the Organization-Location-Job Field Structure

**Prerequisite**

The *Manage Foundation Data* user type permission is required.

The application must be in implementation mode or maintenance mode.

If you want to delete a level in the Organization structure, you must first move elements that are attached to it to another level. You cannot delete levels if elements are linked to the level.

*Configuration > [SmartOrg] Administration*

**Steps**

1. Click Structure Management under Organizations, Locations or Job Fields.
2. Click Edit.
3. Click Delete next to the desired level.

Element Management

The Element Management feature allows a system administrator to view the properties of the Organizations-Locations-Job Fields structure and to manage their children.

Creating an Element for the Organization-Location-Job Field Structure

**Prerequisite**

The *Manage Foundation Data* user type permission is required.

The application must be in implementation mode or maintenance mode.

Entering a sequence number will overwrite the default alphabetical sequencing available in the system.

For an element to be active, all of its parents must be active. If not, the Active (Pending) status will appear in the Status column.

*Configuration > [SmartOrg] Administration*
Steps
1. Click Element Management under Organizations, Locations or Job Fields.
2. Click Create next to Children.
3. Complete the fields.
4. Click Save.

Editing an Element in the Organization-Location-Job Field Structure

Prerequisite
The Manage Foundation Data user type permission is required.
The application must be in implementation mode or maintenance mode.

Configuration > [SmartOrg] Administration

Steps
1. Click Element Management under Organizations, Locations or Job Fields.
2. Click Edit in the Actions column.
3. Make the required changes.
4. Click Save.

Moving an Element in the Organization-Location-Job Field Structure

Prerequisite
The Manage Foundation Data user type permission is required.
The application must be in implementation mode or maintenance mode.

Configuration > [SmartOrg] Administration

Steps
1. Click Element Management under Organizations.
2. In the list of Children, select the element that you want to move.
3. Click Move.
4. Specify under which organization you want to move the selected element.
5. Click Save.

Deleting an Element

Prerequisite
The Manage Foundation Data user type permission is required.
The application must be in implementation mode or maintenance mode.

Configuration > [SmartOrg] Administration

Steps
1. Click Element Management under Organizations, Locations or Job Fields.
2. In the list of Children, select the desired element.
3. Click Delete.

If the organization, location or job field that you want to delete has elements, you must reassign the elements to another organization, location or job field. Click OK in the message box. When the selector
opens, you can reassign the elements by selecting a new organization, location or job field. All the elements (templates, requisitions and candidates) associated to the organization, location or job field are now reassigned to the organization, location or job field selected above.

Adding an Element to the Location or Job Field Structure

Prerequisite
The Manage Foundation Data user type permission is required.
The application must be in implementation mode or maintenance mode.

Configuration > [SmartOrg] Administration

Steps
1. Click Element Management under Organizations, Locations or Job Fields.
2. Click Add next to Children.
3. Select the desired element.
4. Click Select.

Element Deactivation for Recruiting

Over time, Taleo customers might need to deactivate or reactivate certain Organization-Location-Job Field elements in SmartOrg to ensure that the foundation data structure reflects changes to their business process structure.

Reports mention whether the status of an Organization-Location-Job Field element is Active or Inactive. In addition, if you deactivate Organization-Location-Job Field elements, they are no longer displayed in the Recruiting Center but if elements or users are part of requisitions, templates, questions, tasks, candidates, etc. and the elements or users are deactivated afterward, that information is retained for reporting purposes.

If a parent Organization, Location, or Job Field element is deactivated or reactivated, all child elements are updated to have the same state as the parent element.

If an Organization-Location-Job Field element is part of a record (e.g., requisition or candidate file) and the element is deactivated, the system continues to display the element in the record. The Organization-Location-Job Field element is not displayed, however, in Organization-Location-Job Field selectors (e.g., Location Selector) if a user creates a new record or edits an existing one. Recruiting Center users can delete a deactivated Organization-Location-Job Field element from an existing record.

Deactivation is available via Taleo Connect Client (TCC). This can be done by changing the status of the Organization-Location-Job Field element.

Taleo Connect Client Impact
Deactivation is available via Taleo Connect Client (TCC).

Web Services Impact
Deactivation is available via Taleo Connect Client (TCC).

Career Section Impact
• If an Organization-Location-Job Field element is part of a candidate’s profile and the element is deactivated, the system continues to display the element in the profile. Candidates cannot add a deactivated Organization-Location-Job Field element to their profile.
• A candidate cannot add a deactivated Organization-Location-Job Field element to a new search.
• A candidate cannot add a deactivated Organization-Location-Job Field element to a saved search.
- If the candidate runs a saved search that includes a deactivated Organization-Location-Job Field element, the search uses the next higher active Organization-Location-Job Field element; if there is no parent element, the criteria is excluded from the search.
- If a saved search contains a deactivated Organization-Location-Job Field element, the search uses the closest active parent element. The deactivated Organization-Location-Job Field element is ignored if no parent element exists.

**Recruiting Center Impacts**

<table>
<thead>
<tr>
<th>Functionality</th>
<th>Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advanced search</td>
<td>A deactivated Organization-Location-Job Field element can be included in search criteria. This enables the user to retrieve candidates whose candidate file includes an Organization-Location-Job Field element that has since been deactivated.</td>
</tr>
<tr>
<td></td>
<td>If a saved search includes an Organization-Location-Job Field element that has since been deactivated, the element remains part of the search strategy and the search results. The element remains a search criterion if the search is repeated.</td>
</tr>
<tr>
<td>Candidate File</td>
<td>If an Organization-Location-Job Field element is deactivated, it continues to be displayed in a candidate file.</td>
</tr>
<tr>
<td></td>
<td>A deactivated Organization-Location-Job Field element is no longer displayed if the Profile tab is edited. This is recorded in the History tab.</td>
</tr>
<tr>
<td></td>
<td>If a user creates a candidate file or a candidate creates a profile, deactivated Organization-Location-Job Field elements are displayed in the Organization-Location-Job Field Selector windows.</td>
</tr>
<tr>
<td></td>
<td>A deactivated Organization-Location-Job Field element has no effect on source tracking contextualization.</td>
</tr>
<tr>
<td></td>
<td>A deactivated Organization-Location-Job Field element has no effect on LUDS selection contextualization.</td>
</tr>
<tr>
<td>Candidate Match</td>
<td>A deactivated Organization-Location-Job Field element is not displayed.</td>
</tr>
<tr>
<td>Correspondence</td>
<td>The system continues to use deactivated Organization-Location-Job Field elements for contextualization of template.</td>
</tr>
<tr>
<td>Offers (Competitive/Expectation)</td>
<td>If a Job is selected, it continues to be displayed if it is deactivated afterward.</td>
</tr>
<tr>
<td></td>
<td>If a Job is selected, and the Job element is later deactivated, and a user then attempts to edit the Job, the deactivated Job continues to be displayed and can be edited.</td>
</tr>
<tr>
<td></td>
<td>If a Job is deactivated, it is no longer displayed in the Selector window.</td>
</tr>
<tr>
<td>Prescreening and Disqualification Questions</td>
<td>Prescreening questions and disqualification questions retain their association with deactivated Organization-Location-Job Field elements.</td>
</tr>
<tr>
<td></td>
<td>A deactivated Organization-Location-Job Field element is not displayed.</td>
</tr>
<tr>
<td></td>
<td>Questions associated with a deactivated Organization-Location-Job Field element are only displayed if the user selects an element and then selects Show all questions.</td>
</tr>
<tr>
<td></td>
<td>Questions keep their Active status even if the associated Organization-Location-Job Field element has been deactivated.</td>
</tr>
<tr>
<td>Functionality</td>
<td>Impact</td>
</tr>
<tr>
<td>---------------</td>
<td>--------</td>
</tr>
<tr>
<td>Requisitions and templates retain their association with deactivated Organization-Location-Job Field elements.</td>
<td></td>
</tr>
<tr>
<td>A deactivated Organization-Location-Job Field element is not displayed.</td>
<td></td>
</tr>
<tr>
<td>Requisitions associated to a deactivated Organization-Location-Job Field element are only displayed if they are associated with other Organization-Location-Job Field elements whose status is Active. For example, a Location element has been deactivated but the corresponding Job Field and/or Organization elements have an Active status.</td>
<td></td>
</tr>
<tr>
<td>When editing requisitions and templates that contain a deactivated Organization-Location-Job Field element, the requisitions retain their Active status.</td>
<td></td>
</tr>
<tr>
<td>If users edit the requisition, this action does not affect the requisition’s association with the deactivated Organization-Location-Job Field element.</td>
<td></td>
</tr>
<tr>
<td>When creating a requisition or a template, a deactivated Organization-Location-Job Field element is not displayed.</td>
<td></td>
</tr>
<tr>
<td>When creating a requisition or a template, a deactivated Organization-Location-Job Field element is not displayed in Organization-Location-Job Field Selector windows (e.g.: Location Selector).</td>
<td></td>
</tr>
<tr>
<td>When duplicating a requisition or a template, a deactivated Organization-Location-Job Field element is not displayed in Organization-Location-Job Field Selector windows (e.g.: Location Selector).</td>
<td></td>
</tr>
<tr>
<td>Competencies associated with a deactivated Organization-Location-Job Field element are only displayed if the user selects an element and then selects Show all questions.</td>
<td></td>
</tr>
<tr>
<td>Competencies retain their association with deactivated Organization-Location-Job Field elements.</td>
<td></td>
</tr>
<tr>
<td>Competencies keep their Active status even if the associated Organization-Location-Job Field element has been deactivated.</td>
<td></td>
</tr>
<tr>
<td>A deactivated Organization-Location-Job Field element is not displayed.</td>
<td></td>
</tr>
<tr>
<td>When selecting a requisition, a deactivated Organization-Location-Job Field is not displayed.</td>
<td></td>
</tr>
<tr>
<td>When selecting a requisition, the requisition can be selected based on deactivated Organization-Location-Job Field’s next highest active parent element.</td>
<td></td>
</tr>
<tr>
<td>When creating an Organization-Location-Job Field block, a deactivated Organization-Location-Job Field is not displayed in the Organization-Location-Job Field Selector window.</td>
<td></td>
</tr>
<tr>
<td>When editing an Organization-Location-Job Field block, a deactivated Organization-Location-Job Field is not displayed in the Organization-Location-Job Field Selector window.</td>
<td></td>
</tr>
<tr>
<td>When editing an Organization-Location-Job Field, an update is logged on the History tab.</td>
<td></td>
</tr>
</tbody>
</table>
In source tracking, a deactivated Organization-Location-Job Field has no impact on source tracking contextualization.

In Personal Information LUDS, a deactivated Organization-Location-Job Field has no impact on element contextualization.

### Configuration Impact

<table>
<thead>
<tr>
<th>Feature</th>
<th>Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Agency</strong></td>
<td>In view mode, an agency that has a deactivated Organization-Location-Job Field is displayed and the Organization-Location-Job Field value is displayed.</td>
</tr>
<tr>
<td></td>
<td>In edit mode, a deactivated Organization-Location-Job Field is displayed and can be saved.</td>
</tr>
<tr>
<td></td>
<td>When adding an agency, a deactivated Organization-Location-Job Field is not displayed in the Organization-Location-Job Field Selector window.</td>
</tr>
<tr>
<td><strong>Agent</strong></td>
<td>In view mode, tasks that include a deactivated Organization-Location-Job Field are displayed and the Organization-Location-Job Field value is displayed.</td>
</tr>
<tr>
<td></td>
<td>In edit mode, a deactivated Organization-Location-Job Field is displayed and can be saved.</td>
</tr>
<tr>
<td></td>
<td>When adding an agent, a deactivated Organization-Location-Job Field is not displayed in the Organization-Location-Job Field Selector window.</td>
</tr>
<tr>
<td><strong>Automated Task</strong></td>
<td>In view mode, a deactivated Organization-Location-Job Field is not displayed but is displayed on the Display Context tab.</td>
</tr>
<tr>
<td></td>
<td>In edit mode, a candidate selection workflow can be “resaved” with Organization-Location-Job Field if unchanged.</td>
</tr>
<tr>
<td></td>
<td>When adding a candidate selection workflow, a deactivated Organization-Location-Job Field is not displayed in the Organization-Location-Job Field Selector window.</td>
</tr>
<tr>
<td><strong>Candidate Selection Workflow</strong></td>
<td>In view mode, a deactivated Organization-Location-Job Field is displayed.</td>
</tr>
<tr>
<td></td>
<td>In edit mode, a candidate selection workflow can be “resaved” with Organization-Location-Job Field if unchanged.</td>
</tr>
<tr>
<td></td>
<td>When adding a candidate selection workflow, a deactivated Organization-Location-Job Field is not displayed in the Organization-Location-Job Field Selector window.</td>
</tr>
<tr>
<td><strong>Career Section Diversity Forms</strong></td>
<td>In view mode, a deactivated Organization-Location-Job Field is displayed.</td>
</tr>
<tr>
<td></td>
<td>In edit mode, a deactivated Organization-Location-Job Field is displayed and can be saved anew.</td>
</tr>
<tr>
<td></td>
<td>When adding a form, a deactivated Organization-Location-Job Field is not displayed in the Organization-Location-Job Field Selector window.</td>
</tr>
<tr>
<td>Feature</td>
<td>Impact</td>
</tr>
<tr>
<td>---------------------------------------------------</td>
<td>------------------------------------------------------------------------</td>
</tr>
<tr>
<td>When adding a search filter, a deactivated OLF is not displayed in the OLF Field Selector window.</td>
<td>In view mode, a deactivated OLF is displayed.</td>
</tr>
<tr>
<td>When adding an association, a deactivated OLF is not displayed in the OLF Field Selector window.</td>
<td>In view mode, a deactivated OLF is displayed.</td>
</tr>
<tr>
<td>When adding a statement, a deactivated OLF is not displayed in the OLF Field Selector window.</td>
<td>In view mode, a deactivated OLF is displayed.</td>
</tr>
<tr>
<td>When creating an URL, a deactivated OLF is not displayed in the OLF Field Selector window.</td>
<td>In view mode, a deactivated OLF is displayed.</td>
</tr>
<tr>
<td>When editing large selection elements, a deactivated OLF is not displayed in drop-down lists and the value is lost if the user clicks Save. Only the next highest active parent is displayed in drop-down lists.</td>
<td>In view mode, a deactivated OLF is displayed.</td>
</tr>
<tr>
<td>When adding a custom large selection, a deactivated OLF is not displayed in the OLF Field Selector window.</td>
<td>In view mode, a deactivated OLF is displayed.</td>
</tr>
<tr>
<td>When adding a source, a deactivated OLF is not displayed in the OLF Field Selector window.</td>
<td>In view mode, a deactivated OLF is displayed.</td>
</tr>
</tbody>
</table>

When deactivating OLF elements, there are certain behaviors that are important to note. There are some areas where the deactivated elements will still appear for the system.
administrator when using the Taleo Configuration module. If this is a concern, customers should refrain from deactivating OLF elements until this changes.

It is important to note that the system does effectively hide where appropriate deactivated OLF elements from both candidates and Recruiting Center users.

Specifically, system administrators can still associate (either via an add or edit action) content with deactivated OLF elements and can still see deactivated OLF elements in the system administrator OLF tree views in the following areas within Taleo Configuration:

- Create/Modify Agency (Configuration > [Recruiting] Administration > Agencies)
- Create/Modify Agent (Configuration > [Recruiting] Administration > Agencies > Agents)
- Create/Modify Task (Configuration > [Recruiting] Administration > Automated Tasks)
- Create/Modify Selection - where elements are mapped to OLF (Configuration > [Recruiting] Administration > Selection Lists > Large Selections)
- Create/Modify Source (Configuration > [Recruiting] Administration > Sources)
- Create/Modify OLF mapping to a given candidate selection workflow (Configuration > [Recruiting] Administration > Candidate Selection Workflow > Workflow > Display Context Tab)
- Create/Modify Job Board Account OLF Associations (on the permissions tab during create/modify) (Configuration > [Recruiting] Administration > Job Board Accounts > Job Board Account Permissions Tab)
- Create/Modify Department (Configuration > [Recruiting] Administration > Department List)

In addition, the following tree views within Taleo Configuration will still show deactivated OLF elements:

- Source list
- Department list
- Position list

### Organization-Location-Job Field Behavior of Deactivated Elements

<table>
<thead>
<tr>
<th>Context</th>
<th>Action</th>
<th>Organization-Location-Job Field behavior if element is deactivated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Agency</td>
<td>View</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Agency</td>
<td>Edit</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Agency</td>
<td>Add</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Agency - generate new posting</td>
<td>Add</td>
<td>Not displayed</td>
</tr>
</tbody>
</table>

### PDF Form

<p>| Any Future Object configuration such as PDF Forms or Passport Services with Organization-Location-Job Field context | Add | Not displayed |</p>
<table>
<thead>
<tr>
<th>Context</th>
<th>Action</th>
<th>Organization-Location-Job Field behavior if element is deactivated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any Future Object such as PDF Forms or Passport Services with Organization-Location-Job Field context</td>
<td>View</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Any Future Object such as PDF Forms or Passport Services with Organization-Location-Job Field context</td>
<td>Edit</td>
<td>Not displayed</td>
</tr>
</tbody>
</table>

**Automated Tasks for defined Organization-Location-Job Field contexts**

<table>
<thead>
<tr>
<th>Automated Tasks for defined Organization-Location-Job Field contexts</th>
<th>View</th>
<th>Displayed to support historic data integrity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automated Tasks for defined Organization-Location-Job Field contexts</td>
<td>Edit</td>
<td>Displayed if current/historic data selected (to allow re-saving and viewing without affecting data integrity)</td>
</tr>
<tr>
<td>Automated Tasks for defined Organization-Location-Job Field contexts</td>
<td>Add</td>
<td>Not displayed</td>
</tr>
</tbody>
</table>

**Candidate File**

<table>
<thead>
<tr>
<th>Candidate File</th>
<th>View</th>
<th>Displayed to support historic data integrity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidate File</td>
<td>Edit</td>
<td>Displayed if current/historic data selected (to allow re-saving and viewing without affecting data integrity)</td>
</tr>
<tr>
<td>Candidate File</td>
<td>Create</td>
<td>Not displayed</td>
</tr>
</tbody>
</table>

**Candidate Search - New Search Organization-Location-Job Field preferences**

<table>
<thead>
<tr>
<th>Candidate Search - New Search Organization-Location-Job Field preferences</th>
<th>Other</th>
<th>Not displayed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidate Search - Run Saved Search with Organization-Location-Job Field preferences</td>
<td>View</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Candidate Search - Run Saved Search with Organization-Location-Job Field preferences</td>
<td>Edit</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Candidate Search - Run Saved Search with Organization-Location-Job Field preferences</td>
<td>Add</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Context</td>
<td>Action</td>
<td>Organization-Location-Job Field behavior if element is deactivated</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>--------</td>
<td>---------------------------------------------------------------------</td>
</tr>
<tr>
<td>Career Sections Organization-Location-Job Field</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Career Sections Organization-Location-Job Field association admin/config</td>
<td>View</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Career Sections Organization-Location-Job Field association admin/config</td>
<td>Edit</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Career Sections Organization-Location-Job Field association admin/config</td>
<td>Add</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Career Sections URL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Career Sections URL</td>
<td>View</td>
<td>Displayed</td>
</tr>
<tr>
<td>Career Sections URL</td>
<td>Edit</td>
<td>Displayed</td>
</tr>
<tr>
<td>Career Sections URL</td>
<td>Add</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Correspondence</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Correspondence config/admin</td>
<td>View</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Correspondence config/admin</td>
<td>Edit</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Correspondence config/admin</td>
<td>Add</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Disqualification Questions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Disqualification Library config</td>
<td>View</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Disqualification Library config</td>
<td>Edit</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Diversity Forms config/admin</td>
<td>Add</td>
<td>Not displayed</td>
</tr>
<tr>
<td>LUDS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>LUDS</td>
<td>View</td>
<td>Not displayed</td>
</tr>
<tr>
<td>LUDS</td>
<td>Edit</td>
<td>Displayed if current/historic data selected (to allow re-saving and viewing without affecting data integrity)</td>
</tr>
<tr>
<td>LUDS</td>
<td>Add</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Offer Data</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Offer Data</td>
<td>View</td>
<td>Displayed to support historic data integrity</td>
</tr>
<tr>
<td>Offer Data</td>
<td>Edit</td>
<td>Displayed if current/historic data selected (to allow re-saving and viewing without affecting data integrity)</td>
</tr>
<tr>
<td>Context</td>
<td>Action</td>
<td>Organization-Location-Job Field behavior if element is deactivated</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>----------</td>
<td>---------------------------------------------------------------------</td>
</tr>
<tr>
<td>Offer Data</td>
<td>Create</td>
<td>Displayed if current/historic data selected (to allow re-saving and viewing without affecting data integrity)</td>
</tr>
</tbody>
</table>

**Onboarding Tasks**

<table>
<thead>
<tr>
<th>Onboarding tasks admin assigned to Organization-Location-Job Field</th>
<th>View</th>
<th>Not displayed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Onboarding tasks admin assigned to Organization-Location-Job Field</td>
<td>Edit</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Onboarding tasks admin assigned to Organization-Location-Job Field</td>
<td>Add</td>
<td>Not displayed</td>
</tr>
</tbody>
</table>

**Onboarding Transaction**

<table>
<thead>
<tr>
<th>Onboarding transaction association to legacy Organization-Location-Job Field</th>
<th>Other</th>
<th>Displayed to support historic data integrity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Onboarding transaction filtering by Organization-Location-Job Field</td>
<td>Filter</td>
<td>Not displayed</td>
</tr>
</tbody>
</table>

**Prescreening Questions**

<table>
<thead>
<tr>
<th>Prescreening Library config</th>
<th>View</th>
<th>Not displayed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prescreening Library config</td>
<td>Edit</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Prescreening Library config</td>
<td>Add</td>
<td>Not displayed</td>
</tr>
</tbody>
</table>

**Privacy Agreements config/admin**

<table>
<thead>
<tr>
<th>Privacy Agreements config/admin</th>
<th>View</th>
<th>Not displayed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Privacy Agreements config/admin</td>
<td>Edit</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Privacy Agreements config/admin</td>
<td>Add</td>
<td>Not displayed</td>
</tr>
</tbody>
</table>

**Reports**

<table>
<thead>
<tr>
<th>Reporting - Running Reports</th>
<th>Other</th>
<th>Indicated as “inactivated” in the listing</th>
</tr>
</thead>
</table>

**Requisitions**

<table>
<thead>
<tr>
<th>Req File Data</th>
<th>View</th>
<th>Displayed to support historic data integrity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Context</td>
<td>Action</td>
<td>Organization-Location-Job Field behavior if element is deactivated</td>
</tr>
<tr>
<td>--------------------------------------------------</td>
<td>--------</td>
<td>-------------------------------------------------------------------</td>
</tr>
<tr>
<td>Req File Data</td>
<td>Edit</td>
<td>Displayed if current/historic data selected (to allow re-saving and viewing without affecting data integrity)</td>
</tr>
<tr>
<td>Req File Data</td>
<td>Create</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Req Tree View in Recruiting</td>
<td>Filter</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Requisition Filter by Manager or Recruiter</td>
<td>Filter</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Requisition Templates</td>
<td>View</td>
<td>Indicated as “inactivated” in the listing</td>
</tr>
<tr>
<td>Requisition Templates</td>
<td>Edit</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Requisition Templates</td>
<td>Create</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Automated Tasks</td>
<td>Other</td>
<td>Displayed to support historic data integrity</td>
</tr>
<tr>
<td>Run Automated Tasks for Defined Organization-Location-Job Field contexts</td>
<td>Other</td>
<td>Displayed to support historic data integrity</td>
</tr>
<tr>
<td>SmartOrg - Organization-Location-Job Field Admin</td>
<td>View</td>
<td>Invalid; system doesn't allow</td>
</tr>
<tr>
<td>SmartOrg - Organization-Location-Job Field Admin</td>
<td>Edit</td>
<td>Not displayed</td>
</tr>
<tr>
<td>SmartOrg - Organization-Location-Job Field Admin</td>
<td>Create</td>
<td>Not displayed</td>
</tr>
<tr>
<td>SmartOrg - User Admin</td>
<td>View</td>
<td>Invalid; system doesn't allow</td>
</tr>
<tr>
<td>SmartOrg - User Admin</td>
<td>Edit</td>
<td>Not displayed</td>
</tr>
<tr>
<td>SmartOrg - User Admin</td>
<td>Create</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Sources</td>
<td>View</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Source.Tracking config/admin</td>
<td>Edit</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Source.Tracking config/admin</td>
<td>Add</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Context</td>
<td>Action</td>
<td>Organization-Location-Job Field behavior if element is deactivated</td>
</tr>
<tr>
<td>---------</td>
<td>--------</td>
<td>---------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>User Groups</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>User Groups</td>
<td>View</td>
<td>Indicated as “inactivated” in the listing</td>
</tr>
<tr>
<td>User Groups</td>
<td>Edit</td>
<td>Not displayed</td>
</tr>
<tr>
<td>User Groups</td>
<td>Add</td>
<td>Not displayed</td>
</tr>
<tr>
<td>User Groups - access to can./req. data per segmentation rules</td>
<td>Other</td>
<td>Indicated as “inactivated” in the listing</td>
</tr>
<tr>
<td><strong>Departments</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Departments</td>
<td>View</td>
<td>Displayed</td>
</tr>
<tr>
<td>Departments</td>
<td>Edit</td>
<td>Displayed</td>
</tr>
<tr>
<td>Departments</td>
<td>Add</td>
<td>Not displayed</td>
</tr>
<tr>
<td><strong>Work Locations</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Work Locations</td>
<td>View</td>
<td>Indicated as “inactivated” in the listing</td>
</tr>
<tr>
<td>Work Locations</td>
<td>Edit</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Work Locations</td>
<td>Add</td>
<td>Not displayed</td>
</tr>
<tr>
<td><strong>Taleo Performance Flex GUI - Employee</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Taleo Performance Flex GUI - Employee</td>
<td>View</td>
<td>Displayed to support historic data integrity</td>
</tr>
<tr>
<td>Taleo Performance Flex GUI - Employee</td>
<td>Create</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Taleo Performance Flex GUI - Employee</td>
<td>Edit</td>
<td>Displayed</td>
</tr>
<tr>
<td><strong>Taleo Performance Flex GUI - Position</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Taleo Performance Flex GUI - Position</td>
<td>View</td>
<td>Displayed to support historic data integrity</td>
</tr>
<tr>
<td>Taleo Performance Flex GUI - Position</td>
<td>Create</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Taleo Performance Flex GUI - Position</td>
<td>Edit</td>
<td>Not displayed</td>
</tr>
<tr>
<td><strong>Taleo Performance Flex GUI – Job Role (Career)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Taleo Performance Flex GUI - Job Role (Career)</td>
<td>View</td>
<td>Displayed to support historic data integrity</td>
</tr>
<tr>
<td>Context</td>
<td>Action</td>
<td>Organization-Location-Job Field behavior if element is deactivated</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>--------</td>
<td>---------------------------------------------------------------</td>
</tr>
<tr>
<td>Taleo Performance Flex GUI – Job Role (Career)</td>
<td>Create</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Taleo Performance Flex GUI – Job Role (Career)</td>
<td>Edit</td>
<td>Not displayed</td>
</tr>
<tr>
<td><strong>Taleo Performance Flex GUI – Business Org</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Taleo Performance Flex GUI – Business Org</td>
<td>View</td>
<td>Displayed to support historic data integrity</td>
</tr>
<tr>
<td>Taleo Performance Flex GUI – Business Org</td>
<td>Create</td>
<td>Not displayed</td>
</tr>
<tr>
<td>Taleo Performance Flex GUI – Business Org</td>
<td>Edit</td>
<td>Not displayed</td>
</tr>
</tbody>
</table>
Departments

Department

A department represents a division or service in the company where a future employee will work.

A department is the lowest level of an organizational unit. An example of a department could be a documentation department where technical writers, translators and editors are working.

Departments are available in:

- Recruiting Administration menu, under Department List, where system administrators create and edit departments.
- SmartOrg Administration menu, under User Accounts, when system administrators create a user account.
- Recruiting Center when recruiters create a requisition.

Departments can be imported from a Human Resource Management System (HRMS) in Taleo Recruiting using the Taleo integration service or they can be manually created by system administrators. Departments can also be exported, deleted, and recovered via Taleo’s integration service.

Departments can be linked to organizations and locations.

When creating a department, system administrators can define default approvers for requisitions and offers. Specified approvers will be selected automatically when users are requesting the approval of a requisition or an offer.

The autofill functionality is available for departments provided the system administrator has activated the proper setting. Therefore, when users select a department when creating a requisition, the department-related fields will automatically be filled.

Creating a Department

Prerequisite

The Enable Department setting must be activated.

Configuration > [Recruiting] Administration > Department List

Steps

1. Click New...
2. Complete the fields as required.
   - The Department Number must be unique.
   - The Name field must be translated in every available languages.
3. Optional: Associate the department to an organization.
   a) Click Select.
   b) Select values for the desired organization levels.
   c) Click Done.
4. Optional: Associate the department to a location.
   a) Click Select.
   b) Select values for the desired location levels.
   c) Click Done.
5. Optional: Define preferred approvers for requisitions. Specified approvers will be selected automatically when users are requesting the approval of a requisition.
6. Optional: Define preferred approvers for offers. Specified approvers will be selected automatically when users are requesting the approval of an offer.
7. Specify if the department is always active or if it is active during a specific period of time.
8. Optional: Complete department user-defined fields.
9. Click Done.

**Result**
The department is available in the Department List page.

### Deleting a Department

**Prerequisite**
The *Enable Department* setting must be activated.
The system must be in maintenance mode.

*Configuration > [Recruiting] Administration > Department List*

**Steps**
1. Click on a department.
2. Click .

**Result**
The department is no longer available for use and is permanently removed from the database.

### Activating a Department

**Prerequisite**
The *Enable Department* setting must be activated.
The department must be created.

*Configuration > [Recruiting] Administration > Department List*

**Steps**
1. Click on a department.
2. Specify if the department is always active or if it is active during a specific period of time.
3. Click Done.

**Result**
The department is available to users in Taleo Recruiting.

### Deactivating a Department

**Prerequisite**
The *Enable Department* setting must be activated.
The department must have the Active status.

**Configuration > [Recruiting] Administration > Department List**

**Steps**
1. Click on a department.
2. Select Inactive.
3. Click Done.

**Result**
The department is unavailable to users while maintaining the information in the database for reuse.

---

**Associating a Department to an Organization**

**Prerequisite**
The *Enable Department* setting must be activated
You must create a department before you can associate it to an organization.

**Configuration > [Recruiting] Administration > Department List**

**Steps**
1. Click on a department.
2. Specify to which organization the department is associated.
3. Click Done.

---

**Associating a Department to a Location**

**Prerequisite**
The *Enable Department* setting must be activated
You must create a department before you can associate it to a location.

**Configuration > [Recruiting] Administration > Department List**

**Steps**
1. Click on a department.
2. Specify to which location the department is associated.
3. Click Done.

---

**Dissociating a Department from an Organization**

**Prerequisite**
The *Enable Department* setting must be activated.
The department must be associated to an organization.

**Configuration > [Recruiting] Administration > Department List**

**Steps**
1. Click on a department.
2. Under Organization, click 🔄.
3. Click Done.

Disassociating a Department from a Location

**Prerequisite**

The *Enable Department* setting must be activated.

The department must be associated to an organization.

*Configuration > [Recruiting] Administration > Department List*

**Steps**

1. Click on a department.
2. Under Location, click 🔄.
3. Click Done.

Department - Permissions and Settings

The following permissions and settings are used for the department functionality.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage foundation data</td>
<td>Allows users to manage departments.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Configuration &gt; Foundation Data</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Department</td>
<td>Activates the Department functionality throughout the system.</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Link Requisition Location to Department Location</td>
<td>In requisitions and templates, link the Location field to the location specified for the Department. This is a protected setting activated by Oracle Support.</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Link Requisition Organization to Department Organization</td>
<td>In requisitions and templates, link the Organization field to the organization specified for the Department. This is a protected setting activated by Oracle Support.</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Department Autofill Activation</td>
<td>Activate the automatic filling of department-related fields in requisitions.</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Requisition Action Requires Effective Department</td>
<td>When certain actions are performed in requisitions, the department must be effective.</td>
<td>Not Required</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Setting</td>
<td>Description</td>
<td>Default Value</td>
<td>Location</td>
</tr>
<tr>
<td>--------------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------</td>
<td>---------------------------------</td>
</tr>
<tr>
<td>Send Department Information to eQuest When Posting Requisitions</td>
<td>Send the department code to eQuest when posting requisitions in order to do some reporting in eQuest.</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
</tbody>
</table>
Positions

Position

A position represents a job within a company.

A position indicates the type of work offered in the requisition. For example, an administrative assistant, a technical writer, a translator, an editor are all positions within the documentation department. Positions are mainly used by large organizations for headcount planning and management.

Positions are available in:

- Recruiting Administration menu, under Position List.
- SmartOrg Administration, under User Accounts, when system administrators create a user account.
- Recruiting Center when recruiters create a requisition.

Positions are imported from a Human Resource Management System (HRMS) in Recruiting via the Taleo integration service. Positions cannot be created nor edited by system administrators. Positions are mapped to requisition templates.

If the Enable Position setting and the Position field are enabled, the Position field will appear in the Requisition Wizard instead of the Requisition Template field. When recruiters create a requisition and select a position in the Position selector, fields from the requisition template will be automatically filled, with the exception of the Organization, Location, Job Field (OLF) when it exists at the position level.

Configuration

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Position</td>
<td>Activates the concept of position throughout the system and allows the auto-filling of requisitions based on position information.</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
</tbody>
</table>

Viewing Information on a Position

Prerequisite

The Enable Position setting must be activated.

Configuration > [Recruiting] Administration > Position List

Steps

1. In the Position List page, click on a position.
2. View the information. Information such as the position ID, position title, Organization-Location-Job Field structure associated to a position is available.
3. Click Close.
Users

• User Account Management .......................................................................................79
• User Type Management ............................................................................................89
• User Group Management ..........................................................................................100
• Configuration Profiles ..............................................................................................106
### User Account Management

#### User Account

A user account is created for each user who has access to Taleo applications on a regular or occasional basis. User accounts are defined by system administrators in SmartOrg. (Navigation: Configuration > [SmartOrg] Administration > [Users] User Accounts.) When creating a user account, system administrators define the following elements.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Personal Information** | • Complete name  
• Postal address  
• E-mail address  
• Phone and cellular numbers  
• Employee ID (Employee records are also maintained in external systems like the company's HRIS. In those systems, the employee is given a unique ID. The Employee ID field is necessary in order to create the employee record in Taleo when being fed over from an external system.)  
• Title  
• etc. |
| **Employee Information** | Used for Taleo Performance and Dynamic Approval Routing. Once information in this section is provided, both an employee and a candidate file are created for this user and this operation cannot be reverted. Note that only employees can be users of Taleo Performance. Fields to complete are:  
• Employee picture  
• Employee status  
• Employee manager  
• Organization, Location, Job Role  
Any time one of the following events occurs, an entry is added to the Employee History section: updates to employee status; updates to manager, new organization or location; new job role. An entry is recorded whether the change was made directly on the user account page, in Taleo Performance or through SmartOrg integration. The Employee History section is only displayed in Show mode. |
| **Account Information** | • User name  
• Password  
• External user identifier  
• Configuration profile  
• etc. |
| **User Types** | User types assigned to the user account. Each user account is assigned at least one user type for which a series of permissions are granted. |
### User Account General Preferences

General preferences are assigned to each user account.

A user’s general preferences are defined by system administrators in the User Account feature available in SmartOrg. Most general preferences can be modified by users in Taleo Recruiting, in the My Setup feature, to fit their personal preferences.

Certain user account general preferences are tied to a configuration setting. When this is the case, the setting sets a value for an entire zone, the user account general preference sets a value for a specific user, then that specific user can set his/her own personal preference (see table below). For example,

> It is important at deployment to review the defaults for the Default Recruiter and Default Hiring Manager user preferences in My Setup. By default, if there is no Default Recruiter or Default Hiring Manager specified for a user's preference, when the user creates a requisition he/she will be automatically listed as the "Recruiter" on the requisition. If a user has his/her name in the Default Hiring Manager field, this will take precedence and the user will have his/her name appear in the Hiring Manager field rather than the Recruiter field. For proper behavior of managers, it is recommended to specify this information automatically upon integration imports of manager User data.

Note for 7.5 migrations: Integration scripts from 7.5 where users were specified as Manager WebTop users will work for later version migrations to indicate that these users should have their name populated into the Default Hiring Manager field. Customers should validate this is working properly prior to go live and that the integration script has run for all necessary users to have this data populated correctly.

<table>
<thead>
<tr>
<th>User Account General Preference</th>
<th>Setting</th>
<th>User Personal Preference</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>(SmartOrg Administration &gt; User Account &gt; General Preferences)</td>
<td>(Configuration &gt; Settings)</td>
<td>(Recruiting Center &gt; Resources &gt; My Setup)</td>
<td></td>
</tr>
<tr>
<td>Accessibility Features</td>
<td>Accessibility Features</td>
<td>Accessibility Features</td>
<td>By default, shows only candidates that are in selection process (if relevant).</td>
</tr>
<tr>
<td>Candidate List Content</td>
<td></td>
<td>Candidate List Content</td>
<td></td>
</tr>
<tr>
<td>Content Language</td>
<td>Content Language</td>
<td>Content Language</td>
<td></td>
</tr>
<tr>
<td>Correspondence Language</td>
<td>Correspondence Language</td>
<td>Correspondence Language</td>
<td></td>
</tr>
<tr>
<td>User Account General Preference (SmartOrg Administration &gt; User Account &gt; General Preferences)</td>
<td>Setting (Configuration &gt; Settings)</td>
<td>User Personal Preference (Recruiting Center &gt; Resources &gt; My Setup)</td>
<td>Comments</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>Country</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Default Distance Unit</td>
<td>Default Distance Unit</td>
<td>Default Distance Unit</td>
<td></td>
</tr>
<tr>
<td>Default Hiring Manager</td>
<td></td>
<td>Default Hiring Manager</td>
<td>See Important Note above.</td>
</tr>
<tr>
<td>Default Recruiter</td>
<td></td>
<td>Default Recruiter</td>
<td>See Important Note above.</td>
</tr>
<tr>
<td>Default Text Size</td>
<td>Default Text Size</td>
<td>Default Text Size</td>
<td></td>
</tr>
<tr>
<td>Default Theme</td>
<td>Default Theme</td>
<td>Default Theme</td>
<td></td>
</tr>
<tr>
<td>Display Question Details in Libraries</td>
<td></td>
<td>Display Question Details in Libraries</td>
<td></td>
</tr>
<tr>
<td>Enable eShare Email for Response Center Access</td>
<td>Enable eShare Email for Response Center Access</td>
<td>Enable eShare Email for Response Center Access</td>
<td></td>
</tr>
<tr>
<td>Fax Notification</td>
<td>Fax Notification</td>
<td>Fax Notification</td>
<td>Sends notifications to users by fax, not by email.</td>
</tr>
<tr>
<td>Frequent Collaborators</td>
<td></td>
<td>Frequent Collaborators</td>
<td></td>
</tr>
<tr>
<td>Identifier Content</td>
<td></td>
<td>Identifier Content</td>
<td></td>
</tr>
<tr>
<td>Integration Profile Type</td>
<td></td>
<td>Integration Profile Type</td>
<td></td>
</tr>
<tr>
<td>Last Update</td>
<td></td>
<td>Last Update</td>
<td></td>
</tr>
<tr>
<td>Offer Frequent Approvers</td>
<td></td>
<td>Frequent Approvers - Offer</td>
<td></td>
</tr>
<tr>
<td>Place of Residence</td>
<td></td>
<td>Place of Residence</td>
<td></td>
</tr>
<tr>
<td>Preferred Non-Electronic Media</td>
<td></td>
<td>Preferred Non-Electronic Media</td>
<td></td>
</tr>
<tr>
<td>Requisition File Automatic Filling</td>
<td></td>
<td>Requisition File Automatic Filling</td>
<td>Indicates if the user will use the “automatic filling” option of the requisition file.</td>
</tr>
<tr>
<td>Requisition Frequent Approvers</td>
<td></td>
<td>Frequent Approvers - Requisition</td>
<td></td>
</tr>
<tr>
<td>Selected Item Default Color</td>
<td>Selected Item Default Color</td>
<td>Selected Item Default Color</td>
<td></td>
</tr>
<tr>
<td>Sorting Key</td>
<td></td>
<td>Sorting Key</td>
<td></td>
</tr>
<tr>
<td>Tab displayed when accessing a candidate file from a list</td>
<td></td>
<td>Tab displayed when accessing a candidate file from a list</td>
<td></td>
</tr>
<tr>
<td>Tab displayed when accessing a candidate file in navigation</td>
<td></td>
<td>Tab displayed when accessing a candidate file in navigation</td>
<td></td>
</tr>
<tr>
<td>User Account General Preference (SmartOrg Administration &gt; User Account &gt; General Preferences)</td>
<td>Setting (Configuration &gt; Settings)</td>
<td>User Personal Preference (Recruiting Center &gt; Resources &gt; My Setup)</td>
<td>Comments</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>Time Zone</td>
<td>Time Zone</td>
<td>Time Zone</td>
<td></td>
</tr>
<tr>
<td>When managing by candidate</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>When managing by offer</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Workflow Event Notification</td>
<td>Workflow Event Notification</td>
<td>Workflow Event Notification</td>
<td>Keeps the user informed of workflow events by email.</td>
</tr>
<tr>
<td>Zip Code</td>
<td></td>
<td></td>
<td>Used in search preferences, with the location (place of residence) and last update.</td>
</tr>
</tbody>
</table>

**User Account Status**

A user account is assigned a status.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active</td>
<td>Only the name and description can be modified.</td>
</tr>
<tr>
<td>Inactive</td>
<td>Only the status can be modified. The only possibility is to go back to the Active status. Inactive users cannot be selected.</td>
</tr>
<tr>
<td>Deleted</td>
<td>The user account has been deleted.</td>
</tr>
<tr>
<td>Locked</td>
<td>The user account has been locked. The user cannot access Taleo products.</td>
</tr>
<tr>
<td>Expired</td>
<td>The user account has expired. The validity period of the user account has expired.</td>
</tr>
</tbody>
</table>

**Employee Information**

Employee information is specific to Taleo Performance and to Taleo Recruiting for the Dynamic Approval Routing feature.

Employee information is defined in the User Accounts feature available in SmartOrg.

Certain fields in the Employee Information section are not mandatory. However, when fields in this section are populated, the Organization and Location fields become mandatory.

If inserting a picture of the employee, the file limit is 20 KB and the only supported format is .jpg. Note that the uploaded file is cropped from the center to obtain a square (so make sure the picture is correctly centered) and it is then resized to 48 X 48 pixels which results in about 5 KB.

An employee can have one of the following statuses:

- **New**: New employees currently in an onboarding process.
- **Current**: Default value.
- **Former Employee**
If no data is entered in the Job Role and Employee Status fields, default values are assigned automatically by the system, which are Employee and New respectively.

Any time one of the following events occurs, an entry is added to the Employee History section: updates to employee status; updates to manager, new organization or location; new job role. An entry is recorded whether the change was made directly on the user account page, in Taleo Performance or through SmartOrg integration. The Employee History section is only displayed in Show mode.

User Account - Other Configuration Tasks

Creating a User Account

Prerequisite

The Manage user accounts user type permission is required.

In the Employee Information section, certain fields are not mandatory. However, when fields in this section are populated, the Organization and Location fields become mandatory.

In the Employee Information section, if no data is entered in the Employee Status and Job Role fields, these fields will be populated with their default values, Current and Employee.

Steps

1. Click Create.
2. Specify the language in which you want to create the user account.
3. Complete the fields in each section presented by the User Account Wizard.
4. Click Next to navigate between sections.
5. Click Finish.

Result

The user account appears in the User Accounts list.

If the Employee Information section is completed, the user's profile is updated and the person is considered an “employee.” Employees are used in Taleo Performance and the Dynamic Approval Routing.

Editing a User Account

Prerequisite

The Manage user accounts user type permission is required.

Steps

1. Click a user account.
2. Click Edit next to the section you want to modify.
3. Make required changes.
4. Click Save.
Activating a User Account

**Prerequisite**
The *Manage user accounts* user type permission is required.

*Configuration > [SmartOrg] > Administration > User Accounts*

**Steps**
1. Click a user account.
2. Click Activate in Account Information.
3. Click Yes.

Deactivating a User Account

**Prerequisite**
The *Manage user accounts* user type permission is required.

You need to transfer the user's tasks to another user.

This feature may be useful for contract or temporary workers who assist on a assignment but who may leave and later return to an organization. When these workers return, you can reactivate the user account without having to reset their group association (because they are still tied to their user groups).

*Configuration > [SmartOrg] > Administration > User Accounts*

**Steps**
1. Click a user account.
2. Click Deactivate in Account Information.
3. Click Yes.

Deleting a User Account From the User Account Page

**Prerequisite**
The *Manage user accounts - Including HMRS fields* user type permission is required.

*Configuration > [SmartOrg] Administration > User Accounts*

**Steps**
1. Locate the user in the User Accounts list.
2. Click Delete in the Actions column.
3. The action(s) you perform next vary depending on whether the user account is associated with an employee.
   - If the user account is associated with an employee who owns requisitions, templates or folders, or was assigned yet uncompleted actions, or reports to a manager, or has pending tasks or work items, perform the steps in the wizard.
   - If the user account is associated with someone for whom none of the previous conditions applies, click Yes.

**Result**
Once deleted, the user account status is set to Deleted and the user account is deactivated.
Next Step
To permanently delete employee data related to the employee, including employee metrics and all Taleo Performance data (as might be required in EMEA and other regions), see Employee Information Deletion Task.

Assigning a User Type to a User Account

Prerequisite
The Manage user accounts user type permission is required.

Configuration > [SmartOrg] > Administration > User Accounts

Steps
1. Click a user account.
2. Click Edit next to User Types.
3. Click Add next to User Types.
4. Select one or several user types.
5. Click Select.

Result
The user types appear in the User Types list.

Removing a User Type Assigned to a User Account

Prerequisite
The Manage user accounts user type permission is required.

Configuration > [SmartOrg] > Administration > User Accounts

Steps
1. Click a user account.
2. Click Edit next to User Types.
3. Click Remove next to the user type.

Result
The user type is no longer displayed.

Next Step
Assigning a user type to the user account.

Associating a Configuration Profile to a User Account

Prerequisite
The Manage user accounts user type permission is required.

Each user account is assigned one configuration profile. If no configuration profile is used, the default value of each setting is used.

Changes made to a configuration profile are applied the next time a user linked to this configuration profile logs in.
Assigning a Personal Coverage Area to a User Account

Prerequisite
The Manage user accounts permission is required.

Steps
1. Click a user account.
2. Click Create next to Personal Coverage Areas.
3. Click Add next to Functional Domains.
4. Select the desired functional domains then click Select.
5. Click Save.
6. If desired, specify organizations, locations and/or job fields for the coverage area.
   If no Organization-Location-Job Field structure is specified, then the coverage area will apply to all organizations, locations and job fields.

Locking a User Account

Allows a system administrator to lock a user account if, for example, the user was fired.

Prerequisite
The Manage user accounts user type permission is required.

Steps
1. Click a user account.
2. Click Lock in Account Information.
3. Click Yes.

Next Step
Deactivating the user account.
Transferring the user's tasks.

Unlocking a User Account

Allows a system administrator to unlock a user account if, for example, a user enters an incorrect password too many times and the system locks the account.

Prerequisite
The Manage user accounts user type permission is required.
Configuration > [SmartOrg] > Administration > User Accounts

Steps
1. Click a user account.
2. Click Unlock in Account Information.
3. Click Yes.

Generating a Password for a User Account
Allows a system administrator to generate a password for a user if, for example, the user does not have his/her username handy or does not have an email address to receive a temporary access code.

Prerequisite
The Manage user accounts user type permission is required.

Configuration > [SmartOrg] > Administration > User Accounts
Steps
1. Click a user account.
2. Click Generate Password in Account Information.
3. Specify if you want to send the password in an e-mail.
4. Click Yes.

Result
The user will be forced to change his/her password at next login.

Task Delegation
Users may have the ability to delegate tasks to another user for a short preset period of time.

Task delegation is useful during the time a user is on vacation or on a sick leave. When selecting a user (new owner) to whom tasks will be delegated, the following rules apply:

• The new owner must have the same user type permissions (constraints not included) as the current owner.
• The new owner must be at least in all the same groups as the current owner.
• If the current owner is an eShare user (not a Taleo application user), the new owner must also be an eShare user.

When a user delegates tasks to an alternate user, if the user is a collaborator on a requisition, the alternate user must also be made collaborator on that requisition in order to perform the same actions as the user. The system does not automatically allow the delegated to interact as a collaborator on behalf of the original user.

Delegating Tasks
Prerequisite
The Manage user accounts user type permission is required.

For a user to be valid for delegation, the following rules must be applied:
• The new owner must be different from the current owner.
• It is always possible for a Recruiting Center user to be the new owner.

Configuration [SmartOrg] > Administration > User Accounts

Steps
1. Click a user account.
2. Click Delegate in Account Information.
3. Select a user.
4. Select From and To dates.
5. Click Save.

Transferring Tasks

Prerequisite
The Manage user accounts user type permission is required.
If the work items transferred belong to an employee, the designated user must also be an employee.
The owner of the work items transferred must have the same user type as the designated user.

Configuration > [SmartOrg] > Administration > User Accounts

Steps
1. Click a user account.
2. Click Transfer in Account Information.
3. Select a user.
4. Click Save.

Result
Tasks have been transferred permanently to another use.

Next Step
Deleting the user account.
User Type Management

User Type

A user type is composed of a set of permissions from multiple functional domains. These permissions provide access to various products and control what a user associated to the user type can do.

User types are centrally managed in SmartOrg for all products. Default user types predefined by Taleo are provided with the system. System administrators can also create new user types.

Users are assigned a user type and one user can be associated to several user types. For example, the Recruiter and Administrator user types for Recruiting, and the Manager user type for Performance.

- It is recommended to leave untouched the Taleo default user types.
- When creating a user type, it is recommended to duplicate an existing user type that has been validated in the zone already to work properly.
- If possible, use a single user type which combines all necessary permissions.

User Type Permission

User type permissions grant users access to specific features and contexts in a product or application.

Permissions are organized by functional domains (core products):

- Recruiting
- Integration
- Configuration
- Performance
- Grid
- Compensation
- Learning
- Reporting and Analytics
- Mobile
- Common

Functional domains are then separated into sub-domains. Depending on the amount of permissions in a sub-domain, permissions may be grouped into sections. When permissions are grouped into sections, system administrators can select the desired section in a drop-down list and quickly see the permissions grouped in that section.

<table>
<thead>
<tr>
<th>Example of how permissions are organized in a functional domain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Functional Domain</td>
</tr>
<tr>
<td>Sub-Domain</td>
</tr>
<tr>
<td>Section</td>
</tr>
<tr>
<td>Permission</td>
</tr>
<tr>
<td>Permission</td>
</tr>
</tbody>
</table>
Example of how permissions are organized in a functional domain

<table>
<thead>
<tr>
<th>Permission</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Allow access to campus requisitions</td>
</tr>
<tr>
<td></td>
<td>Allow access to contingent requisitions</td>
</tr>
<tr>
<td></td>
<td>Allow access to executive requisitions</td>
</tr>
<tr>
<td></td>
<td>Allow access to pipeline - general requisitions</td>
</tr>
<tr>
<td></td>
<td>Allow access to pipeline - executive requisitions</td>
</tr>
</tbody>
</table>

Functional domains are displayed in bold when permissions have been granted. Also, the Expand All button allows system administrators to see at a glance all domains, sub-domains and permissions granted to a user type.

If a system administrator modifies the permissions associated with a user type, the changes affect all users who have been assigned the user type.

For a list of default user types and their default permissions, refer to the document entitled Default User Types and Permissions.

**Default Taleo User Types**

User types predefined by Taleo are provided with the system.

<table>
<thead>
<tr>
<th>Code</th>
<th>Name</th>
<th>Description</th>
<th>Functional Domains</th>
</tr>
</thead>
<tbody>
<tr>
<td>01-RecruitingAdmin</td>
<td>Recruiting - Administrator</td>
<td>The Recruiting Administrator has permissions for virtually all recommended features and functions in the Recruiting and Configuration centers.</td>
<td>Recruiting</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Configuration</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Grid</td>
</tr>
<tr>
<td>02-PowerRecruiter</td>
<td>Recruiting - Power Recruiter</td>
<td>A Power Recruiter has permissions for most features and functions within the Recruiting Center, but has limited ability to manage prescreening libraries and templates. Depending on each organization’s specific needs, you may wish to duplicate this user type and remove or add permissions. This default user type provides a good starting point for other Recruiting management roles.</td>
<td>Recruiting</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Configuration</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Grid</td>
</tr>
<tr>
<td>03-BasicRecruiter</td>
<td>Recruiting - Basic Recruiter</td>
<td>A Basic Recruiter has limited access to the Recruiting Center and to requisitions depending on Group membership. Depending on each organization’s specific needs, you may wish to duplicate this user type and remove or add permissions.</td>
<td>Recruiting</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Configuration</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Grid</td>
</tr>
<tr>
<td>Code</td>
<td>Name</td>
<td>Description</td>
<td>Functional Domains</td>
</tr>
<tr>
<td>---------------</td>
<td>---------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------------</td>
</tr>
<tr>
<td>04-PowerManager</td>
<td>Recruiting - Power Manager</td>
<td>A Power Manager has broad permissions within the Recruiting Center to manage his own hiring cycles with more limited recruiter involvement. Depending on each organization’s specific needs, you may wish to duplicate this user type and remove or add permissions.</td>
<td>Recruiting, Configuration, Grid</td>
</tr>
<tr>
<td>05-BasicManager</td>
<td>Recruiting - Basic Manager</td>
<td>A Basic Manager has limited access to the Recruiting Center and to requisitions he owns. Depending on each organization’s specific needs, you may wish to duplicate this user type and remove or add permissions.</td>
<td>Recruiting, Configuration</td>
</tr>
<tr>
<td>06-HourlyManager</td>
<td>Recruiting - Hourly Manager</td>
<td>An Hourly Manager typically works in a decentralized/field environment, doing continuous hiring on “Evergreen Requisitions” without requiring requisition approvals. The Hourly Manager may be working with limited support from HR.</td>
<td>Recruiting, Configuration</td>
</tr>
<tr>
<td>07-BasicOnboarding</td>
<td>Onboarding - Basic User</td>
<td>Basic Onboarding users can start Onboarding processes, and can view and execute their own assigned tasks. Depending on each organization’s specific needs, you may wish to duplicate this user type and remove or add permissions.</td>
<td>Recruiting, Grid</td>
</tr>
<tr>
<td>08-PowerOnboarding</td>
<td>Onboarding - Power User</td>
<td>Power Onboarding users can start and cancel Onboarding processes, and can view and execute all processes and tasks. Depending on each organization’s specific needs, you may wish to duplicate this user type and remove or add permissions.</td>
<td>Recruiting, Grid</td>
</tr>
<tr>
<td>Code</td>
<td>Name</td>
<td>Description</td>
<td>Functional Domains</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------</td>
</tr>
</tbody>
</table>
| 09-OnboardingAdmin  | Onboarding - Administrator    | Onboarding Administration users can configure new hire portals and all tasks, forms, and other elements of Onboarding processes. Depending on each organization’s specific needs, you may wish to duplicate this user type and remove or add permissions. | • Recruiting  
• Grid       |
| 10-Employee         | Employee                      | An employee has permission to perform Talent Management activities as an individual contributor. This includes the ability to create goals and development activities, complete a review self-assessment and update their talent profile. | • Recruiting  
• Performance |
| 11-PerformanceHRA   | Performance - HR Administrator| A HR Administrator has the ability to manage Talent Management activities for goal management, performance reviews, development, and succession planning. HR Administrators also have access to governance tools for managing these talent management business processes. | • Recruiting  
• Performance  
• Grid       |
| 12-PerformanceManager | Performance - Manager        | A Manager has the ability to perform Talent Management activities as an individual contributor and as a manager of employees. This can include direct reports as well as multiple levels of indirect reports. Managers also have the ability to complete performance reviews and manage approvals for employee activities. | • Recruiting  
• Performance |
| 13-ReportingUser    | Reporting User                | Includes the permission which allows users to view, refresh and export reports in Business Objects.                                                                                                         | • Grid  
• Reporting and Analytics |
<p>| 14-DashboardUser    | Dashboard User                | Includes the permission which allows users to view dashboards and analytics in Business Objects.                                                                                                             | • Reporting and Analytics |
| 15-SystemAdmin      | System Administrator          | Users with this user type can perform operations that pertain                                                                                                                                              | • Configuration          |</p>
<table>
<thead>
<tr>
<th>Code</th>
<th>Name</th>
<th>Description</th>
<th>Functional Domains</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>to Central Configuration and SmartOrg specific configuration. Can be used for users that only need system administration access to the system or that need system administration on top of other functional domain access.</td>
<td>✷ Grid</td>
</tr>
<tr>
<td>16-BasicTransitions</td>
<td>Transitions - Basic User</td>
<td>Basic Transitions users can start New Hire and Pre-Hire processes in the Recruiting Center, and can view and execute their own assigned tasks in the Transitions Center. Depending on each organization’s specific needs, you may wish to duplicate this user type and remove or add permissions.</td>
<td>✷ Recruiting, ✷ Grid</td>
</tr>
<tr>
<td>17-PowerTransitions</td>
<td>Transitions - Power User</td>
<td>Power Transitions users can start and cancel New Hire and Pre-Hire processes in the Recruiting Center, and can extend electronic offers. They can also view and execute all processes and tasks in the Transitions Center. Depending on each organization’s specific needs, you may wish to duplicate this user type and remove or add permissions.</td>
<td>✷ Recruiting, ✷ Grid</td>
</tr>
<tr>
<td>18-TransitionsAdmin</td>
<td>Transitions - Administrator</td>
<td>Transitions Administration users can configure all tasks, forms, content pages, and other elements of New Hire and Pre-Hire processes. They can also start and cancel New Hire and Pre-Hire processes in the Recruiting Center, and can extend electronic offers. Depending on each organization’s specific needs, you may wish to duplicate this user type and remove or add permissions.</td>
<td>✷ Recruiting, ✷ Grid</td>
</tr>
</tbody>
</table>

For a list of default user types and their default permissions, refer to the document entitled *Default User Types and Permissions*.

These default user types are the ones recommended by Taleo as a starting point for system operability and represents traditional usage patterns. It is recommended to leave untouched the Taleo default user
types. Sourcing database zones come with these default user types. For existing and migrating zones, these user types can be manually created if desired. Once created, it is recommended to duplicate an existing user type that has been validated in the zone already to work properly.

Manager User Types and Related Permissions

Several features can be accessed by managers.

Several features that managers could not access in version 7.5 can now be accessed in Taleo 10. In version 7.5, your organization may have granted permissions to some of these features but the product definition was preventing access to them. For this reason, it is important to verify the Manager user types in Taleo 10 to ensure that they are set as desired.

The table presents user type permissions that are recommended for re-validation for all Manager user types. These permissions appear in the table because:

- They represent a permission that managers could not have in version 7.5 due to product constraints.
- They represent new permissions added to allow this version to align with the 7.5 product constraints specific to managers.
- They represent new permissions added to allow this version to align with settings that may have been configured in version 7.5 specifically for managers.

<table>
<thead>
<tr>
<th>Functional Domain</th>
<th>Sub-Domain</th>
<th>Permission</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recruiting</td>
<td>Requisition</td>
<td>Access Posting and Sourcing</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Requisition</td>
<td>Amend an approval path created by another user (user B)</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Requisition</td>
<td>Amend an approval path created by this user</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Requisition</td>
<td>Approve requisitions</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Requisition</td>
<td>Choose to pass when this user decides on behalf of another approver</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Requisition</td>
<td>Choose to pass when this user is asked to approve a requisition</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Requisition</td>
<td>Create an approval path</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Requisition</td>
<td>Create Requisitions &gt; Only from a Template</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Requisition</td>
<td>Create templates</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Requisition</td>
<td>Decide for other approvers when creating an approval path</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Requisition</td>
<td>Manually fill (close) a requisition</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Requisition</td>
<td>Put a requisition on hold</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Requisition</td>
<td>Recover deleted templates</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Requisition</td>
<td>Remove approver, change decision of approver, or change approved requisition recipient when amending an approval path created by another user</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Requisition</td>
<td>Remove approver, change decision of approver, or change approved requisition recipient when amending an approval path created by this user</td>
</tr>
<tr>
<td><strong>Functional Domain</strong></td>
<td><strong>Sub-Domain</strong></td>
<td><strong>Permission</strong></td>
</tr>
<tr>
<td>----------------------</td>
<td>----------------</td>
<td>----------------</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Requisition</td>
<td>Reopen a filled or cancelled requisition</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Requisition</td>
<td>Save a requisition as open</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Requisition</td>
<td>Select Taleo system sources in selector window</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Requisition</td>
<td>Send an approval request reminder for requisitions</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Candidates</td>
<td>Create Candidates</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Candidates</td>
<td>Delete Applications</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Candidates</td>
<td>Delete Candidate Files</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Candidates</td>
<td>Edit the information about the referring agent in the &quot;Agents&quot; tab</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Candidates</td>
<td>Set candidate selection workflow event dates, Edit comments in history summary</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Prescreening</td>
<td>Access question and competency libraries</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Prescreening</td>
<td>Create and edit requisition-specific questions</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Prescreening</td>
<td>Create Questions, Edit Questions and Competencies</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Prescreening</td>
<td>Display scoring information (weight and result columns) - this was defined via MWT setting in Taleo 7.5, ensure this permission is set as desired for your user types in Taleo 10.</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Prescreening</td>
<td>Edit Profiler, Edit Models</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Prescreening</td>
<td>Manage disqualification questions</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Prescreening</td>
<td>Remove or delete questions and competencies</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Prescreening</td>
<td>View and manage ACE threshold and alert recipients</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Prescreening</td>
<td>View and manage the &quot;Request More Information&quot; alert</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Prescreening</td>
<td>View and manage the daily recruiting report</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Sourcing</td>
<td>Extend posting and unpost</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Sourcing</td>
<td>Invite matching candidates to apply</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Sourcing</td>
<td>Post requisitions</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Sourcing</td>
<td>Post to staffing agents/agencies</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Sourcing</td>
<td>Prevent and allow posting</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Sourcing</td>
<td>Request Internet mining by specialized agencies</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Sourcing</td>
<td>Request sourcing strategy by specialized agencies</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Sourcing</td>
<td>Submit ads to non-electronic media</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Offer</td>
<td>All offer and offer approval permissions - this entire module was not available to managers in 7.5. Ensure these permissions are set as desired for your manager user types in Taleo 10.</td>
</tr>
<tr>
<td>Functional Domain</td>
<td>Sub-Domain</td>
<td>Permission</td>
</tr>
<tr>
<td>-------------------</td>
<td>------------</td>
<td>------------</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Search</td>
<td>Access advanced search</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Search</td>
<td>Access candidate Quick and Specific search</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Search</td>
<td>Access competencies and questions criteria</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Search</td>
<td>Access External/Internal candidate criteria</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Search</td>
<td>Allow the same search criteria more than once within a query</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Search</td>
<td>Allow users to select the attribute Required, Desired or Excluded</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Search</td>
<td>Allow users to view candidates that are being considered in other active requisitions</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Search</td>
<td>Customize advanced search queries</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Search</td>
<td>Edit, move or delete search queries created by other users and saved in shared folders</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Other</td>
<td>Use Personal Folders</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Other</td>
<td>Share Personal Folders</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Other</td>
<td>Access Shared Folders</td>
</tr>
</tbody>
</table>

User Type - Other Configuration Tasks

Creating a User Type

**Prerequisite**
When creating a user type, it is recommended to duplicate an existing user type that has been validated in the zone already to work properly.

The Manage user types user type permission is required.

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

**Steps**

1. Click Create.
2. Enter a code and a name.
3. Enter a description to clarify the intent of the user type.
   The description is displayed in the user type selector and listed under the user account definition page.
4. Select Active from the Status list so it can be added to user accounts and groups, otherwise select Inactive.
5. Click Save.
6. Click beside the functional domain you want to configure and click Edit to display the user type permissions.
7. Select the required view and manage permissions and click Save.
Changing a User Type Status

**Prerequisite**

The *Manage user types* user type permission is required.

*Configuration > [SmartOrg] Administration > User Types*

**Steps**

1. Click a user type.
2. Click Edit next to Properties.
3. Select either Active or Inactive from the Status list.
4. Click Save.

**Result**

If changed to Active, the user type can now be associated with a user account or group and the status Active appears in the User Types list. If changed to Inactive, the user type cannot be associated to any new user accounts or groups, but will remain valid for those it is already associated with.

Deactivating a User Type

**Prerequisite**

The *Manage user types* user type permission is required.

The user type must have the Active status.

*Configuration > [SmartOrg] Administration > User Types*

**Steps**

1. Click a user type.
2. Click Edit next to Properties.
3. Select Draft in the Status field.
4. Click Save.

**Result**

The status Draft appears in the User Types list.

Duplicating a User Type

**Prerequisite**

The *Manage user types* user type permission is required.

*Configuration > [SmartOrg] Administration > User Types*

**Steps**

1. Locate the user type you want to duplicate.
2. From the Actions column, click Duplicate for the user type.
3. Change the code, name and description as required.
   
   When you have more than one language, after entering the name for the initial language, click Refresh and select the next language from the list and click Refresh again. Enter the required value for that language and then choose the next language, click Refresh and repeat the process.
4. Click Save.

**Result**

On the user type definition page, your actions are displayed in the History section. On the User Types page, the new user type is displayed and its status is Active.

**Editing User Type Properties**

**Prerequisite**

The *Manage user types* user type permission is required.

*Configuration > [SmartOrg] Administration > User Types*

**Steps**

1. Click a user type.
2. Click Edit next to Properties.
3. Make the required changes to the code, name and description.
4. Click Save.

**Dissociating All Users from a User Type**

**Prerequisite**

The *Manage user types* user type permission is required.

*Configuration > [SmartOrg] Administration > User Accounts*

**Steps**

1. In the Refine by field, select User Type.
2. In the adjacent field, enter a word or part of a word found in the name of the user type you want to delete.
3. Click Refresh.
4. Click a name displayed in the User Accounts list.
5. Click Edit next to User Types.
6. Locate the user type you want to remove and click Remove in the Actions list.
7. Click Save.
8. Repeat steps 4 to 7 for each user who has the user type you want to delete.

**Result**

The user type is no longer displayed in the User Types list.

**Next Step**

Deleting a user type.

**Deleting a User Type**

**Prerequisite**

The *Manage user types* user type permission is required.

You can delete a user type provided no users are associated with the user type.
Steps
1. Locate the user type you want to delete.
2. Click Delete in the Actions column.

Result
The user type is no longer displayed in the User Types list.

Granting a User Type Permission

Prerequisite
The Manage user types user type permission is required.

Steps
1. Click a user type.
2. Click a functional domain.
3. Click Edit next to the sub-domain.
4. Select the permissions you want to grant.
5. Click Save.

Result
All users assigned with this user type now have the selected permissions.

Revoking a User Type Permission

Prerequisite
The Manage user types user type permission is required.

Steps
1. Select a user type.
2. Click the functional domain (and in some cases the sub-domain) containing the permission.
3. Click Edit next to the section containing the permission you want to revoke.
4. Clear the check box next to the permission you want to revoke.
5. Click Save.

Result
On the user type definition page, your actions are displayed in the History section. The users who have the user type will no longer have the permissions you revoked.
User Group Management

User Group

A user group is a group of people who need to have access to the same information (for example, a group of people who work on the same requisitions).

User groups are used in Taleo Recruiting, Taleo Performance, and Taleo Reporting and Analytics.

The creation of a few groups typically simplifies the work of an organization's users because each group has access only to the information that its members need.

One group, called the Main Group is created for all users within an organization. The Main Group's Organization- Location-Job Field structure cannot be modified.

The creation of a user group by system administrators involves:

• Defining a name for the group.
• Selecting users belonging to the group.
• Defining the coverage areas of the group to specify the product areas to which the group has access, that is selecting domains and sub-domains and linking them to organizations, locations and job fields.

For Reporting, group creation also involves:

• Creating a folder in Business Objects.
• Selecting groups that have the reporting domain tied to it to define who gets access to the reports within that folder.

The product domains when defining a coverage area are:

<table>
<thead>
<tr>
<th>Recruiting</th>
<th>Performance</th>
<th>Reporting and Analytics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisitions</td>
<td>Succession Plans</td>
<td>Reporting and Analytics</td>
</tr>
<tr>
<td>Search</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Special rules regarding user groups:

• Users should be removed from the Main Group after being added to a specific group.
• To gain access to elements associated to a particular group, the user must belong to that group.
• It is only possible to delete a group if all its members belong to at least one other group.
• It is not possible to delete a group if a user is associated to this group.
• It is not possible to delete a group if elements (such as requisitions) remain associated to the group.
• If a user is removed from a group and the user owns one or more element (such as requisitions) associated with this group, the elements will appear in red in the system (for example, in the requisition list) to indicate that there is a conflict.

User Group Management

User groups are used in Taleo Recruiting, Taleo Performance and Taleo Reporting and Analytics.

• Recruiting Center
• It is possible to create a user and to not link the user to a user group. In Recruiting Center, it is recommended that users belong to at least one user group if they are a recruiting user who creates, approves or manages requisitions. If a user is authorized to search, the user will be able to view candidates of all Organization-Location-Job Field structures unless a user group using the recruiting search domain.
• Search and requisition are independent domains that can be individually applied to a user group.
• If users do not belong to a group linked to the Requisition domain, and they are a Recruiting user, the user will only see requisitions they own or collaborate on or without restriction (All) if so authorized. The user will not see information in or by group, even if their user type permission state otherwise – since there are no groups linked to the user to view. In addition, the user will not see information in or by group, even if their user type permission state otherwise – since there are no groups linked to the user to view.
• Taleo Performance
• Users will only see the data of the domain that belongs to their group, provided they have the proper user type permission.
• It is possible to create a user and not link the user to a group for a given domain. For all sub-domains (except for the Employee Succession Search) users will not be able to see information in or by group, even if their user type permission state otherwise – since there are no groups linked to the user to view. If a user is authorized to search (sub-domain Employee Succession Search), the user will be able to view employees of all Organization-Location-Job Field structures.
• Taleo Reporting and Analytics
• The reporting administrator creates documents within the reporting and analytics environment. These include Web Intelligence Documents, Analytics, Advanced Analytics, Single Dashboards, Tiered Dashboards, Hyperlinks, Desktop Intelligence Documents and imported files (PDF, XLS, DOC, TXT, etc…)
• Each reporting document is filed into a “folder.”
• Each reporting folder can be linked to one or more reporting groups containing the reporting domain.
• Users can belong to one or more groups that have the reporting domain associated. Reporting Administrator ties these groups to reporting folders where reporting and analytic documents are filed.
• Users only have access to the documents included in the folders to which their group(s) are linked. With the exception of reporting administrators, if a user has no groups linked to a reporting domain, he/she will not be able to see any reports.
• When generating a report data presented is still derived by user’s access in that application (Recruiting Center or Performance)

Creating a User Group

Prerequisite
The Manage groups user type permission is required.

Configuration > [SmartOrg] Administration > User Groups

Steps
1. Click Create
2. Complete the New Group page.
3. If your organization activated more than one language, enter values for each of the other languages, being sure to click Refresh after you select a new language and before you enter the values for that language.
4. Click Save.

Result
The system displays the user group. If you display the list of user groups, the new user group appears there.
Next Step
Adding users to the user group.
Defining coverage areas for the user group.

Adding a User to a User Group

Prerequisite
The Manage groups user type permission is required.
You must create a user group before you can add users to it.

Configuration > [SmartOrg] Administration > User Groups

Steps
1. Click a user group.
2. Click Add next to Users.
3. Click the check box next to each user you want to add to the user group.
4. Click Select.

Result
The user is displayed in the Users list.

Removing a User from a User Group

Prerequisite
The Manage groups user type permission is required.

Configuration > [SmartOrg] Administration > User Groups

Steps
1. Click a user group.
2. Click Show next to Users.
3. In the Actions column, click Remove next to the user you want to remove.

Result
The user is no longer displayed in the Users list. The History section is not updated automatically but if you move to a different page and then display the user group definition page anew, the action you performed is displayed in the History section.

If you remove a user from a group and the user owns one or more requisitions associated with this group, the requisitions will appear in red in the Requisitions list to indicate that there is a conflict. To revert the situation, re-enter the owner of the requisitions in the group, reassign each requisition owned by this user to a new user who belongs to the same group, reassign each requisition owned by this user to a group to which the owner used to belong.

Deleting a User Group

Prerequisite
The Manage groups user type permission is required.

It is not possible to delete a group if requisitions or templates remain associated to the group.
Steps
1. In the User Groups list, locate the user group you want to delete.
2. Click Delete in the Actions column.
3. Click Yes.

Result
The user group is removed from the User Groups list.

Coverage Area
A coverage area is a combination of functional domains, Organizations, Locations and Job Fields that together determine the scope of information available to a specific user group.

The coverage areas of a group define exactly what kind of information is available to the group's members. A coverage area typically contains domains (and perhaps subdomains), which are core products, and Organizations, Locations and Job Fields. The combination of domains, Organizations, Locations and Job Fields associated with a coverage area determine the scope of information available to the group for that area.

Adding a Coverage Area to a User Group
Allows the system administrator to limit the information available to a user group by specifying core products and Organizations, Locations and Job Fields.

Prerequisite
The Manage groups user type permission is required.

Steps
1. Click a user group.
2. Click Create next to Coverage Areas.
3. Click Add next to Functional Domains.
4. Select the domain/subdomain you want to make available to the user group.
5. Click Select.
6. Click Save.

Result
The domains you selected are displayed in the Functional Domains section of the Coverage Area page.

Next Step
Adding organizations, locations and job fields to the coverage area.

Removing a Coverage Area from a User Group
Allows a system administrator to reduce the kinds of information currently available to the user group.

Prerequisite
The Manage groups user type permission is required.
**Configuration > [SmartOrg] Administration > User Groups**

**Steps**
1. Click a user group.
2. Click Show next to Coverage Areas.
3. Click Remove next to the coverage area you want to remove.
4. Click Yes.

**Result**
The coverage area is no longer displayed in the Coverage Areas list. The History section is not updated automatically but if you move to a different page and then display the user group definition page anew, the action you performed is displayed in the History section.

**Adding Organizations, Locations and Job Fields to a Coverage Area**
Allows the system administrator to further define which information will be available to members of the user group according to organizations, locations and job fields.

**Prerequisite**
The Manage groups user type permission is required.

You must add functional domains to a coverage area before you can add Organization, Location and Job Field values.

**Configuration > [SmartOrg] Administration > User Groups**

**Steps**
1. On a Coverage Area page, click Add next to the type of item you want to add: Organizations, Locations or Job Fields.
2. After the system displays the corresponding selector page, click the check box next to each item you want to add to the coverage area.
3. Click Select.
4. You can repeat the previous steps if you added Organization elements, for example, and you also want to add Location and Job Field elements.

**Result**
The Organization, Location and Job Field elements you added are displayed in the corresponding sections of the Coverage Area page.

**Removing Organizations, Locations and Job Fields from a Coverage Area**

**Prerequisite**
The Manage groups user type permission is required.

**Configuration > [SmartOrg] Administration > User Groups**

**Steps**
1. Click a user group.
2. Click Show next to Coverage Areas.
3. Click a coverage area.
4. On the Coverage Area page, click Remove next to the item you want to remove.

**Result**

The Organization, Location or Job Field element you removed is not longer displayed in the corresponding section of the Coverage Area page.

**Reducing the Scope of a Coverage Area**

You can remove functional domains, Organizations, Locations and Job Fields if you want to reduce the scope of a coverage area.

**Prerequisite**

*Configuration > (SmartOrg) Administration > User Groups*

**Steps**

1. Click a user group.
2. Click Show next to Coverage Areas.
3. Click the coverage area you want to modify.
4. You can perform any of the following steps.
   • To remove a functional domain, Organization, Location or Job Field, click the corresponding Remove in the Actions column.
   • To remove all Organizations, all Locations or all Job Fields, click Remove All next to the corresponding item.

**Result**

The items you removed are no longer displayed the Coverage Areas page. The actions you performed are displayed in the History section of the user group definition page.
Configuration Profiles

Configuration Profile

A configuration profile is a set of settings which control how the application behaves for a specific set of users to better fit the user experience.

It is through the configuration profile that different product behaviors can be achieved such as a streamlined manager product experience vs. a more robust recruiter product experience. Users may have the same set of permissions which grant access to specific features, but how a user is presented access to the features is then further controlled by the configuration profile designation.

In addition to user types (which define user access to specific features via permissions and product access) and user groups (which further define access to elements and functions based on Organization-Location-Job Field, users are assigned a configuration profile which defines what they will see in the Recruiting Center.

![Diagram showing User Account, User Type, User Group, and Configuration Profile]

Defines user access to specific features via permissions and product access.
Further defines access to elements and functions based on OLF.
Defines what users will see (home page, navigation bar, etc.)

Configuration profiles are created in SmartOrg. Once created, a configuration profile is assigned to Recruiting Center users via their user account. Therefore, depending on the user signing into the application, elements displayed to the user will vary depending on the configuration profile associated to the user.

Three default configuration profiles are provided:

- Recruiter
- Hiring Manager
- Hourly Manager

System administrators can edit the settings for these default configuration profiles and can also create new configuration profiles. Changes made to a configuration profile are applied the next time a user linked to this configuration profile logs in.

By default, when a new user is created, no configuration profile is assigned to the user. If no configuration profile is used, the default value of each setting is used.
For configuration profile settings, see Configuration Profile Settings.

**Configuration**

To have access to the Configuration Profiles feature in SmartOrg, the following permission is required.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage configuration profile</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Configuration &gt; User Management</td>
</tr>
</tbody>
</table>

**Configuration Profile Settings**

<table>
<thead>
<tr>
<th>Configuration Profile Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>About Link in Auxiliary Menu</td>
<td>Display the about link in the auxiliary menu.</td>
</tr>
<tr>
<td>Advanced Search &quot;Save Query&quot; Button</td>
<td>Displays the &quot;Save Query&quot; button in the advanced search page.</td>
</tr>
<tr>
<td>Advanced Search Links</td>
<td>Displays the advanced search links.</td>
</tr>
<tr>
<td>Advanced Search Toolbar</td>
<td>Displays the advanced search toolbar.</td>
</tr>
<tr>
<td>Auxiliary Navigation Bar</td>
<td>Displays the auxiliary navigation bar.</td>
</tr>
<tr>
<td>Candidate File Creation</td>
<td>Indicates the files used to create a candidate.</td>
</tr>
<tr>
<td>Candidate List Format</td>
<td>Candidate list format available for users having this configuration profile.</td>
</tr>
<tr>
<td>Center Stage - Separator Line</td>
<td>Display a line between the Welcome title and the content of the main center stage (this line helps to help distinguish the title from the body portion of the page).</td>
</tr>
<tr>
<td>Center Stage - Welcome Title</td>
<td>Display the Welcome message when users first log in and are presented the Recruiting center stage.</td>
</tr>
<tr>
<td>Center Stage Configuration</td>
<td>Indicates the center stage configuration.</td>
</tr>
<tr>
<td>Center Stage Footer Text</td>
<td>Indicates if the center stage footer is displayed.</td>
</tr>
<tr>
<td>Communication Channel - Custom Link</td>
<td>Contains the link text towards the custom page in the communication channel.</td>
</tr>
<tr>
<td>Communication Channel - Custom Link Tooltip</td>
<td>Contains the tooltip text for the link towards the custom page in the communication channel.</td>
</tr>
<tr>
<td>Communication Channel - Custom Link URL</td>
<td>Indicates the URL of the custom page in the communication channel.</td>
</tr>
<tr>
<td>Communication Channel - Custom Text</td>
<td>Contains the text to be displayed in the custom communication channel.</td>
</tr>
<tr>
<td>Communication Channel - Custom Title</td>
<td>Contains the title to be displayed in the custom communication channel.</td>
</tr>
<tr>
<td>Communication Channel - HTML Custom URL</td>
<td>Indicates the URL of the HTML custom page in the communication channel.</td>
</tr>
<tr>
<td>Communication Channel Mode</td>
<td>Indicates the &quot;Communications&quot; channel mode to be used.</td>
</tr>
<tr>
<td>Configuration Profile Setting</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Core Navigation Bar</td>
<td>Displays the core navigation bar.</td>
</tr>
<tr>
<td>Customer Support Section</td>
<td>Enable the customer support section.</td>
</tr>
<tr>
<td>Customer Support Text</td>
<td>Contains the text to be displayed in the customer support section.</td>
</tr>
<tr>
<td>Dashboard Configuration</td>
<td>Assign a specific dashboard configuration to a configuration profile.</td>
</tr>
<tr>
<td>Default &quot;Advanced Search&quot; Field Configuration</td>
<td>Displays the selection of fields that are available to the user when performing an advanced search.</td>
</tr>
<tr>
<td>eLearning Section URL</td>
<td>Indicates the target URL to the eLearning section.</td>
</tr>
<tr>
<td>Recruiting Header Text</td>
<td>Displays the Recruiting header text.</td>
</tr>
<tr>
<td>Release Notes</td>
<td>Display the release note information when accessing the application, according to the user's profile.</td>
</tr>
<tr>
<td>Requisition File Automatic Filling</td>
<td>I want to use the &quot;automatic filling&quot; option of the requisition file.</td>
</tr>
<tr>
<td>Requisition File Creation</td>
<td>Indicates the files used to create a requisition.</td>
</tr>
<tr>
<td>Requisition List Format</td>
<td>Requisition list format available for users having this configuration profile.</td>
</tr>
<tr>
<td>Search Widget</td>
<td>Displays the search widget.</td>
</tr>
<tr>
<td>Show information for Filter Default</td>
<td>Indicates the default value for the context filter (Show filter), which controls what requisitions are included in the Recruiting requisition list and center stage channels. Possible values are: I own (default), I collaborate on, I own or collaborate on, All users, My coverage area.</td>
</tr>
<tr>
<td>Show information for Filter Visibility</td>
<td>Indicates whether the context filter control is displayed on the Recruiting requisition list and homepage.</td>
</tr>
<tr>
<td>Training Section URL</td>
<td>Indicates the target URL to the training section (Oracle University). The URL is <a href="http://education.oracle.com/pls/web_prod-plq-dad/ou_product_category.getPage?p_cat_id=356">http://education.oracle.com/pls/web_prod-plq-dad/ou_product_category.getPage?p_cat_id=356</a>.</td>
</tr>
<tr>
<td>View or Edit Requisition File</td>
<td>File used for viewing or editing a requisition.</td>
</tr>
<tr>
<td>Web Support Link in Auxiliary Menu</td>
<td>Display the web support link in the auxiliary menu.</td>
</tr>
<tr>
<td>Welcome Center Content</td>
<td>Indicates which customized content and layout will be used in the Welcome Center.</td>
</tr>
</tbody>
</table>

**Creating a Configuration Profile**

**Prerequisite**

The Manage configuration profile user type permission is required.

*Configuration > [SmartOrg] Administration > [Users] Configuration Profiles*

**Steps**

1. Click Create.
2. Provide a code and a name.
3. Click Save.
4. Click configuration profile settings and set them as desired.
5. Click Save.

Activating a Configuration Profile

**Prerequisite**
A configuration profile must have the Draft or Deactivated status.
The Manage configuration profile user type permission is required.

*Configuration > [SmartOrg] Administration > [Users] Configuration Profiles*

**Steps**
1. Click a configuration profile.
2. Click Activate.

Associating a Configuration Profile to a User Account

**Prerequisite**

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

**Steps**
1. Click a user account.
2. Click Edit next to Account Information.
3. Select a configuration profile.
4. Click Save.

Deactivating a Configuration Profile

**Prerequisite**
A configuration profile must be activated.
The Manage configuration profile user type permission is required.

*Configuration > [SmartOrg] Administration > [Users] Configuration Profiles*

**Steps**
1. Click a configuration profile.
2. Click Deactivate.

Deleting a Configuration Profile

**Prerequisite**
The Manage configuration profile user type permission is required.
The configuration profile must have the Draft or Inactive status.
Steps

1. Click Delete next to the configuration profile.
2. Click Yes.
Lists and Filters

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List Formats

List formats allow the display of candidate and requisition information in different columns. Default candidate and requisition list formats are available. However, system administrators can create new list formats to better suit their organization needs. Recruiting Center users can select (among the list formats created by their system administrator) the list format they wish to use to display candidate and requisition information. They can also create up to three list formats and select columns to display specific information (if permissions were granted). Columns available to choose from have been previously defined by system administrators.

In this illustration, the Education list format was selected to display candidate information.
List Format Context

List formats are organized by context, that is pages in the system where candidate files and requisition files would be presented to Recruiting Center users.

List format contexts are provided by the system. System administrators cannot create new ones. A context can contain several list formats. The number of list formats that can be created for a context is defined by Taleo.

<table>
<thead>
<tr>
<th>Type of List</th>
<th>Default List Format Contexts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidate</td>
<td>• All Candidates by Requisition List</td>
</tr>
<tr>
<td></td>
<td>• All Candidates by Folder List</td>
</tr>
<tr>
<td></td>
<td>• All Candidate by Offer List</td>
</tr>
<tr>
<td></td>
<td>• List of automatically pooled candidates</td>
</tr>
<tr>
<td></td>
<td>• Requisition Specific Candidate List</td>
</tr>
<tr>
<td></td>
<td>• Candidate Capture/Possible Duplicates List</td>
</tr>
<tr>
<td></td>
<td>• Search Results / Advanced Search</td>
</tr>
<tr>
<td></td>
<td>• Search Results / Quick Search</td>
</tr>
<tr>
<td>Requisition</td>
<td>• Requisition List</td>
</tr>
<tr>
<td></td>
<td>• Mini Requisition List</td>
</tr>
</tbody>
</table>
List Format Variation

Variations are used to organize list format contexts.

Three variations are available. Each Recruiting Center user is linked to a variation via their *configuration profile.*
Configuring List Formats

The configuration of a list format consists of the following steps.

1. Making fields available so they can be used as column headers in a list.
2. Creating the list format.
3. Displaying advanced filters in the list.
4. Displaying quick filters in the list.
5. Creating custom instructions for the list format context.
6. Assigning a list format variation to configuration profiles.

Be aware of the following specific field visibility behavior in candidate lists. Fields can be made visible for internal or external candidates (via the candidate security level permissions) and fields can be contextualized to appear only for certain Organizations-Locations-Job Fields or staffing types circumstances. As a result:

- When a field was not made visible to the user for both internal and external candidates, the column will appear but data will be blank for situations where the user should not see the data.
- When a field was made visible to the user for either internal or external candidates, the column will appear but data will be blank for situations where the user should not see the data.
- When a field was made visible and available (active) to the user but was not used in the candidate file, data will be displayed if it exists. (This may happen if the field was supplied on another submission where the field is present).
- When a field is not present on the file because it was not configured for display in a specific context (Organizations-Locations-Job Fields or staffing types), data will be displayed if it exists. (This may happen if the field was supplied on another submission where the field is present.)

If compensation data is hidden from certain user types, it is important not to allow these fields to be available in the requisition list view context for these user types. If compensation fields are present in a list view, the data will appear to the user regardless of compensation data viewing permissions. It is possible to hide these fields from select user populations only by using the list format "variation" concept that is applied to a user's configuration profile.

Making a Field Available as a Column Header in a List

Prerequisite

Configuration > [Recruiting] Administration > Fields

Steps

1. Click a field category.
2. Click the name of a field.
3. Click Edit Field Availability next to Properties.
5. Click Save.

Result

The field can be selected to appear as a column header in a list.
Creating a List Format

**Prerequisite**

.Configuration > [Recruiting] Administration > List Formats

**Steps**

1. Click on the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. In the Context Details page, under the Formats for this Context tab, click New...
5. Provide a name for the list format.
6. Translate the name of the list format using the Languages list located on the top right hand side of the page.
7. Optional: Enter comments.
8. Optional: Specify if the list format you are creating will be the default list format for the context.
9. Choose columns for the list by selecting the check box next to each column name.
10. Order columns by selecting a number in the Sequence Number column, then click Reorder.
11. Sort candidate or requisition files that will be displayed in the list according to a specific criterion. Up to three different sorting criteria can be specified.
   a) To select a criterion, click ▲ in the Sort By column next to the desired column name.
   b) To select a second sorting criterion, click ▲ in the Then by column next to the desired column name.
   c) To select a third sorting criterion, click ▲ in the second Then by column next to the desired column name.
   d) To select ascending or descending sorting order, click ▲ repeatedly.
12. Optional: Select the Group records by first sort criterion option if you want to group files in the list format.
13. Click the Active check box to activate the list format.
14. Click Done.

**Result**

The list format appears in the Context Details page, under the Formats for this Context tab.

**Next Step**

If you created a candidate list format, specify the candidate file identifier content.

Displaying Advanced Filters in a List

**Prerequisite**

.Configuration > [Recruiting] Administration > List Formats

**Steps**

1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. Select Show Advanced Filters.
5. Click Done.

**Result**
The Advanced Filters button is displayed in the Recruiting Center for the selected candidate or requisition list format context. Note that criteria available in advanced filters are pre-defined by the system based on the columns selected for the list format context. You cannot modify them. For details, see *Advanced Filters*.

### Displaying Quick Filters in a List
System administrators have the ability to configure quick filters available in requisitions and candidates lists.

For a list format context, system administrators can select quick filters amongst a predefined list of filters. See *Candidate Quick Filters* and *Requisition Quick Filters*.

System administrators can define a default value for certain quick filters. These default values are automatically applied to the list.

- If a quick filter is displayed to users, users can choose to edit the default value for the filter.
- If a quick filter is not displayed to users, this means that the users will only see candidates or requisitions according to this default value. As a result, the total number of candidates or requisitions can be different from what users see on their list.

For example: In the list format "All Candidates / By Requisition", the system administrator decides to not display the ACE filter but yet decides to set the ACE filter as a default value. As a result, when users review the candidates list of a specific requisition, they will see a certain number of candidates. However, if they click the "candidate" number, which will display the list format "All candidates / By Requisition" for that same requisition, the system will present them with only the ACE candidates, but will not display the ACE filter and therefore the number of candidates they see are reduced to only show ACE candidates.

### Displaying Quick Filters

#### Prerequisite
*Configuration > [Recruiting] Administration > List Formats*

**Steps**
1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. In the Context Details page, click the Quick Filters tab.
5. Select filtering criteria by selecting the Displayed check box next to each criterion.
6. Optional: You can select a default criterion by selecting the Default Value check box next to the criterion.
7. Order filtering criteria by selecting a number in the Sequence Number column.
   For candidate list filters, the configuration option appears repeatedly for every single list format, however, similar requisition formats such as requisition specific candidate list formats will share the same configuration. Changing it in one location, will change it in all others as well.
8. Click Apply.
9. Click Done.

**Result**
Quick filters are displayed in the Recruiting Center for the selected requisition or candidate list format context.
Creating Custom Instructions for a List Format Context

**Prerequisite**

Only one text can be customized by context by language.

The text must be created for all available languages.

*Configuration > [Recruiting] Administration > List Formats*

**Steps**

1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. In the Step Information field, enter information that could help clarify, for example, the list format options to Recruiting Center users or explain that other contexts are available for different recruiting circumstances.
   
   A maximum of 1000 text based characters is supported. HTML, rich text format (RTF) and hyperlinks are not supported.
5. Click Done.

**Result**

The text appears in a callout located to the left of the List Format Configuration icon which is available in the top right hand corner of a list. The callout only appears if instructions are provided. The instructions appear for all lists in the context.

Assigning a List Format Variation to Configuration Profiles

**Prerequisite**

*Configuration > [SmartOrg] Administration > [Users] Configuration Profiles*

**Steps**

1. Click a configuration profile.
2. Click the Candidate List Format setting.
3. Click Edit.
4. Select a list format variation in the Value drop-down list.
5. Click Save.
6. Click the Requisition List Format setting.
7. Click Edit.
8. Select a list format variation in the Value drop-down list.
9. Click Save.
10. Go back to the SmartOrg Configuration menu.
11. Click User Accounts.
12. Click a user account.
13. Click Edit next to Account Information.
14. Select a configuration profile.
15. Click Save.
List Format - Other Configuration Tasks

Adding a Column in a List Format

Prerequisite

Configuration > [Recruiting] Administration > List Formats

Steps
1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. In the Formats for this Context tab, click a list format.
5. Select the check box next to a column.
6. Click Done.

Ordering Columns in a List Format

Prerequisite

Configuration > [Recruiting] Administration > List Formats

Steps
1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. In the Formats for this Context tab, click a list format.
5. Select a number in the Sequence Number column.
6. Click Reorder.
7. Click Done.

Result
Columns are placed in the list according to the order specified.

Selecting a Default List Format

Prerequisite

The list format must be Active.

Configuration > [Recruiting] Administration > List Formats

Steps
1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. In the Formats for this Context tab, click a list format.
5. Select the option Default format for this context.
6. Click Done.

Result
In the Context Details page, under the Formats for this Context tab, a check icon appears in the Default column, next to the list format. The list format will be applied by default to the list.

Setting Sort Criteria in a List Format

Prerequisite
The list format must be created in order to set sorting criteria.

Configuration > [Recruiting] Administration > List Formats

Steps
1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. In the Formats for this Context tab, click a list format.
5. To select a criterion, click ▲ in the Sort By column next to the desired column name.
6. To select a second sorting criterion, click ▲ in the Then by column next to the desired column name.
7. To select a third sorting criterion, click ▲ in the second Then by column next to the desired column name.
8. To select ascending or descending sorting order, click ▲ repeatedly.
9. Click Done.

Grouping Files in a List Format

Prerequisite

Configuration > [Recruiting] Administration > List Formats

Steps
1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. In the Formats for this Context tab, click a list format.
5. Select the option Group records by first sort criterion.
6. Click Done.

Result
Files are grouped in the candidate or requisition list. For example, a system administrator could decide to group candidate files by cities. As a result, the candidate list could display candidate files grouped by the city of Boston, then the city of Los Angeles, New York, San Francisco, etc.
Ordering List Formats

Prerequisite

*Configuration* > [Recruiting] Administration > List Formats

Steps

1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. In the Formats for this Context tab, select a number in the Sequence Number column.
5. Click Reorder.
6. Click Done.

Result

List formats for the context are displayed in the specified order.

Deactivating a List Format

Prerequisite

*Configuration* > [Recruiting] Administration > List Formats

Steps

1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. In the Formats for this Context tab, click a list format.
5. Clear the Active checkbox.
6. Click Done.

Result

In the Context Details page, under the Formats for this Context tab, a check icon no longer appears in the Active column next to the list format. Also, the list format is unavailable when users select a list format for a candidate or requisition list.

Next Step

If you no longer want this list format, you can delete it.

Deleting a List Format

Prerequisite

A default list format cannot be deleted.

*Configuration* > [Recruiting] Administration > List Formats

Steps

1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. In the Formats for this Context tab, select a list format.
5. Click

Result
The list format is deleted from the database. It no longer appears in the Context Details page, under the Formats for this Context tab and it is unavailable to users.

Adding a Column to a Context

Prerequisite
Configuration  >  [Recruiting] Administration  >  List Formats
Steps
1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. In the Columns in this Context tab, click Add...
5. Select a field group.
6. Select a field in the Available Fields list.
7. Click Add.
8. Click Done.

Result
The column appears in the Columns in this Context tab. The column is available to Recruiting Center users when they customize their list formats.

Removing a Column from a Context

Prerequisite
Configuration  >  [Recruiting] Administration  >  List Formats
Steps
1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. In Columns in this Context tab, select a column.
5. Click Remove.

Result
The column no longer appears in the Columns in this Context tab. Also, the column is not displayed to users when they customize their own candidate or requisition list format.

Next Step
Reordering columns in the context.
Hiding Advanced Filters

Prerequisite

*Configuration* > [Recruiting] Administration > List Formats

Steps

1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. Clear Show Advanced Filters.
5. Click Done.

Result

The Advanced Filters button is no longer displayed for the selected candidate or requisition list format context.

Candidate File Identifier

The candidate file identifier is used to specify which candidate-specific information is presented in the Candidate column of candidates lists.

The candidate file identifier can provide the following information in the form of text or icon:

- Candidate name (first name, last name, middle initial)
- Identification number
- Ace candidate
- Internal candidate
- In at least one selection process
- Referred candidate

The Candidate column is always displayed in candidates lists. System administrators are responsible of defining which information will appear by default in the column. However, Recruiting Center users can modify the default set by their system administrator via their personal preferences available under My Setup.

Specifying the Default Candidate File Identifier Content

Prerequisite

*Configuration* > [Recruiting] Administration > [Fields] File Identifiers

Steps

1. Click Candidate.
2. Select the information you want to display.
3. Select a sorting key to determine which value will be used to sort the candidate column.
4. Click Done.

Result

Selected values appear in the Record Identifiers page. Also, the elements selected will appear by default in the Candidate column of candidates lists.
List Format - Permissions and Settings

The following permissions and settings are used for the list format functionality.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create personal list formats for the requisition list</td>
<td>Allows Recruiting Center users to create personalized requisition list formats.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions</td>
</tr>
<tr>
<td>Create personal list formats for the candidate list</td>
<td>Allows Recruiting Center users to create personalized candidate list formats.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Candidates</td>
</tr>
<tr>
<td>Access requisition-specific candidate lists</td>
<td>Allows Recruiting Center users to access requisition-specific candidate lists.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Candidates</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Requiring Attention icon in Candidate Submissions</td>
<td>Removes the &quot;Item Requiring Attention&quot; icon from the candidate file upon some specific actions performed by a recruiter or a hiring manager against a candidate, even if the candidate's file has not been physically viewed.</td>
<td>On</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Maximum Number of Items in List</td>
<td>Indicates the maximum number of items displayed in the list (tasks, requisitions, templates, submissions, etc). The maximum number of items allowed is 1000. Contact Oracle Support for details.</td>
<td>1000</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Maximum Candidate List Columns</td>
<td>Sets the number of columns that can be used in a candidate list format. The default value is 17 columns.</td>
<td>17</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Maximum Number of UDF for Candidate List Columns</td>
<td>Sets the number of columns of type user-defined field (UDF) that can be used in a candidate list format. The default value is 12. Contact Oracle Support for details.</td>
<td>12</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Item Requiring Attention icon in Candidate Submissions</td>
<td>Removes the Item Requiring Attention icon when an action has been performed</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Setting</td>
<td>Description</td>
<td>Default Value</td>
<td>Location</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------</td>
<td>---------------</td>
<td>----------------------------</td>
</tr>
<tr>
<td>against a candidate, even if the candidate’s file has not been physically viewed.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Activity Date Default Filter</td>
<td>By default, apply the filter &quot;Last Activity Date&quot;.</td>
<td>No</td>
<td>Configuration&gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Last Activity Date Default Filter Value</td>
<td>Show only candidate files whose last activity date has occurred during the last X days (0 = today).</td>
<td>30</td>
<td>Configuration&gt; [Recruiting] Settings</td>
</tr>
</tbody>
</table>

The table below indicates the actions affected by the activation of the *Item Requiring Attention icon in Candidate Submissions* setting.

<table>
<thead>
<tr>
<th>Action</th>
<th>The * icon is removed?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>General Actions</strong></td>
<td></td>
</tr>
<tr>
<td>Go in the candidate profile</td>
<td>No</td>
</tr>
<tr>
<td><strong>Offer Actions</strong></td>
<td></td>
</tr>
<tr>
<td>Create Offer</td>
<td>Yes</td>
</tr>
<tr>
<td>Make Offer</td>
<td>Yes</td>
</tr>
<tr>
<td>Cancel Offer</td>
<td>Yes</td>
</tr>
<tr>
<td>Capture Expectation</td>
<td>Yes</td>
</tr>
<tr>
<td>Capture Candidate Response</td>
<td>Yes</td>
</tr>
<tr>
<td>Capture Competitive Offer</td>
<td>Yes</td>
</tr>
<tr>
<td>Extend Offer</td>
<td>Yes</td>
</tr>
<tr>
<td>Renege Offer</td>
<td>Yes</td>
</tr>
<tr>
<td>Rescind Offer</td>
<td>Yes</td>
</tr>
<tr>
<td>Send Offer</td>
<td>Yes</td>
</tr>
<tr>
<td>Update Expiration Date</td>
<td>Yes</td>
</tr>
<tr>
<td>Update Start Date</td>
<td>Yes</td>
</tr>
<tr>
<td>Request Approval</td>
<td>Yes</td>
</tr>
<tr>
<td>Amend Approval Path</td>
<td>Yes</td>
</tr>
<tr>
<td>Decide on Approval</td>
<td>Yes</td>
</tr>
<tr>
<td>Terminate Approval</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Candidate Selection Workflow Actions</strong></td>
<td></td>
</tr>
<tr>
<td>Move/Change Status &amp; Step</td>
<td>Yes</td>
</tr>
<tr>
<td>Action</td>
<td>The icon is removed?</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>----------------------</td>
</tr>
<tr>
<td>Bypass</td>
<td>Yes</td>
</tr>
<tr>
<td>Reject</td>
<td>Yes</td>
</tr>
<tr>
<td>Has Declined</td>
<td>Yes</td>
</tr>
<tr>
<td>Hire</td>
<td>Yes</td>
</tr>
<tr>
<td>Schedule Interview</td>
<td>Yes</td>
</tr>
<tr>
<td>Update Interview</td>
<td>Yes</td>
</tr>
<tr>
<td>Cancel Interview</td>
<td>Yes</td>
</tr>
<tr>
<td>Mark as Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Mark as No</td>
<td>Yes</td>
</tr>
<tr>
<td>Mark as Maybe</td>
<td>Yes</td>
</tr>
<tr>
<td>Move all to next step</td>
<td>Yes</td>
</tr>
<tr>
<td>Move to next step</td>
<td>Yes</td>
</tr>
<tr>
<td>Revert</td>
<td>Yes</td>
</tr>
<tr>
<td>Reset Selection Process</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Candidate File Actions</strong></td>
<td></td>
</tr>
<tr>
<td>Match</td>
<td>No</td>
</tr>
<tr>
<td>Merge</td>
<td>No</td>
</tr>
<tr>
<td>Share</td>
<td>No</td>
</tr>
<tr>
<td>Fill Out Form</td>
<td>No</td>
</tr>
<tr>
<td>Print</td>
<td>No</td>
</tr>
<tr>
<td>File in folder</td>
<td>No</td>
</tr>
<tr>
<td>Compare</td>
<td>Yes</td>
</tr>
<tr>
<td>Add Comment</td>
<td>No</td>
</tr>
<tr>
<td>Add Grade</td>
<td>No</td>
</tr>
<tr>
<td>Attach File</td>
<td>No</td>
</tr>
<tr>
<td>Send Correspondence</td>
<td>No</td>
</tr>
<tr>
<td>Find Similar Candidate</td>
<td>No</td>
</tr>
<tr>
<td>Remove candidate</td>
<td>No</td>
</tr>
<tr>
<td>Delete Submission</td>
<td>Yes</td>
</tr>
<tr>
<td>Undelete Submission</td>
<td>Yes</td>
</tr>
<tr>
<td>Action</td>
<td>The icon is removed?</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>----------------------</td>
</tr>
<tr>
<td>Create Screening Request</td>
<td>No</td>
</tr>
<tr>
<td>Open Candidate Submission</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Onboarding Actions</strong></td>
<td></td>
</tr>
<tr>
<td>Start Onboarding Process</td>
<td>Yes</td>
</tr>
<tr>
<td>Cancel Onboarding Process</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Column Width in Lists

The width of columns in lists differs whether the column header contains an icon or words.

The width of columns represented with an icon is 26 pixels.

The width of columns represented with a word (field) is set as follows: the word length + the sorting icon length. There is a minimum default width of 50 pixels. Note that if a column has two fields (like Employer/Title or Step/Status), then the width would be increased by 30 pixels.

There are exceptions to the above rule. The following columns have a specific hard-coded default width:

<table>
<thead>
<tr>
<th>Candidate List Column - Hard-coded Width</th>
<th>Width</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application LinkedIn ID</td>
<td>70 pixels</td>
</tr>
<tr>
<td>Profile LinkedIn ID</td>
<td>70 pixels</td>
</tr>
<tr>
<td>Application City</td>
<td>100 pixels</td>
</tr>
<tr>
<td>Profile City</td>
<td>100 pixels</td>
</tr>
<tr>
<td>Application State, City</td>
<td>100 pixels</td>
</tr>
<tr>
<td>Profile State, City</td>
<td>100 pixels</td>
</tr>
<tr>
<td>Contest Number, Job Information, Title</td>
<td>170 pixels</td>
</tr>
<tr>
<td>Job Information, Title</td>
<td>170 pixels</td>
</tr>
<tr>
<td>Application CRI</td>
<td>170 pixels</td>
</tr>
<tr>
<td>Profile CRI</td>
<td>170 pixels</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Requisition List Column - Hard-coded Width</th>
<th>Width</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisition Active Locales</td>
<td>45 pixels</td>
</tr>
<tr>
<td>Requisition Mini Active Locales</td>
<td>45 pixels</td>
</tr>
<tr>
<td>Job Active Locales</td>
<td>45 pixels</td>
</tr>
<tr>
<td>Requisition Status</td>
<td>100 pixels</td>
</tr>
<tr>
<td>Requisition Status Detail</td>
<td>100 pixels</td>
</tr>
<tr>
<td>Requisition Mini Status Detail</td>
<td>100 pixels</td>
</tr>
<tr>
<td>Job Status</td>
<td>100 pixels</td>
</tr>
<tr>
<td>Requisition Recruiter</td>
<td>100 pixels</td>
</tr>
<tr>
<td>Requisition Mini Recruiter</td>
<td>100 pixels</td>
</tr>
<tr>
<td>Requisition Recruiter Assistant</td>
<td>100 pixels</td>
</tr>
<tr>
<td>Requisition Mini Recruiter Assistant</td>
<td>100 pixels</td>
</tr>
<tr>
<td>Job Recruiter</td>
<td>100 pixels</td>
</tr>
<tr>
<td>Requisition List Column - Hard-coded Width</td>
<td>Width</td>
</tr>
<tr>
<td>------------------------------------------</td>
<td>---------</td>
</tr>
<tr>
<td>Requisition ID</td>
<td>100 pixels</td>
</tr>
<tr>
<td>Requisition Title</td>
<td>170 pixels</td>
</tr>
<tr>
<td>Requisition Mini Title</td>
<td>170 pixels</td>
</tr>
<tr>
<td>Requisition Job Information Title</td>
<td>170 pixels</td>
</tr>
<tr>
<td>Requisition Mini Job Information Title</td>
<td>170 pixels</td>
</tr>
<tr>
<td>Requisition Mini Title 2</td>
<td>170 pixels</td>
</tr>
<tr>
<td>Requisition Mini Title 3</td>
<td>170 pixels</td>
</tr>
<tr>
<td>Job Information Title</td>
<td>170 pixels</td>
</tr>
</tbody>
</table>
## Maximum Number of Rows Displayed in a List

<table>
<thead>
<tr>
<th>List Type</th>
<th>Maximum number of rows returned</th>
<th>Results displayed if the maximum number of rows returned is exceeded</th>
<th>Results are sorted if not all rows can be displayed</th>
<th>Scrollbar available</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisitions List</td>
<td>1000</td>
<td>Yes (but, no indication that the results exceeded the limit)</td>
<td>Yes. A system sort is applied using the last modification date. The user can then perform a sort on the 1000 requisitions.</td>
<td>Yes</td>
</tr>
<tr>
<td>Candidates List</td>
<td>1000</td>
<td>No (but a message indicates to filter the list)</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Job-Specific Candidate List</td>
<td>1000</td>
<td>No (but a message indicates to filter the list)</td>
<td>The user can perform a sort.</td>
<td>Yes</td>
</tr>
<tr>
<td>Automatic Candidate Pooling List</td>
<td>300</td>
<td>Yes (but, no indication that the results exceeded the limit)</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Advanced Search Results List</td>
<td>300</td>
<td>Yes (but, no indication that the results exceeded the limit)</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Offers List</td>
<td>1000</td>
<td>No (but a message indicates to filter the list)</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Selectors (such as Organizations, Locations, Job Fields, Employers, Institutions, etc.)</td>
<td>1000</td>
<td>Yes (but, no indication that the results exceeded the limit)</td>
<td>Alphabetical sort</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Quick Filters

Quick filters help Recruiting Center users to quickly filter a list down to relevant information. Quick filters are displayed on the left panel of a page and are available in the following lists:

- Tasks
- Requisitions
- Candidates
- Offers
- Requisition Templates
- Questions
- Interview Questions
- Disqualification Questions
- Competencies
- Evaluation Categories
- Evaluation Questions
- Evaluation Questionnaires

By default, quick filter categories are collapsed and only display selected filtering criteria. A criterion can be removed by clicking the adjacent to the criterion.

When no quick filter is selected, the list displays all available entries. As soon as one filter is selected, it is automatically applied to the list and the list refreshes according to the selection made. Users do not need to refresh the list. For example, in the Requisitions list, if the Status - Open quick filter is selected, only open requisitions are displayed in the list.

Several quick filters can be applied at a time. Some quick filters have an icon to refresh the related list. Also, when entering data in more than one field and clicking or pressing the Enter key, the refresh action takes into account the data entered in all the fields.
When applying Organization, Location or Job Field quick filters, select the desired value and then click into another field in the quick filter area to get the list to refresh with the criteria applied.

Displaying Quick Filters in a List

System administrators have the ability to configure quick filters available in requisitions and candidates lists. For a list format context, system administrators can select quick filters amongst a predefined list of filters. See Candidate Quick Filters and Requisition Quick Filters.

System administrators can define a default value for certain quick filters. These default values are automatically applied to the list.

- If a quick filter is displayed to users, users can choose to edit the default value for the filter.
- If a quick filter is not displayed to users, this means that the users will only see candidates or requisitions according to this default value. As a result, the total number of candidates or requisitions can be different from what users see on their list.

For example: In the list format "All Candidates / By Requisition", the system administrator decides to not display the ACE filter but yet decides to set the ACE filter as a default value. As a result, when users review the candidates list of a specific requisition, they will see a certain number of candidates. However, if they click the "candidate" number, which will display the list format "All candidates / By Requisition" for that same requisition, the system will present them with only the ACE candidates, but will not display the ACE filter and therefore the number of candidates they see are reduced to only show ACE candidates.

Displaying Quick Filters

Prerequisite

Configuration > [Recruiting] Administration > List Formats

Steps
1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. In the Context Details page, click the Quick Filters tab.
5. Select filtering criteria by selecting the Displayed check box next to each criterion.
6. Optional: You can select a default criterion by selecting the Default Value check box next to the criterion.
7. Order filtering criteria by selecting a number in the Sequence Number column.
   For candidate list filters, the configuration option appears repeatedly for every single list format, however, similar requisition formats such as requisition specific candidate list formats will share the same configuration. Changing it in one location, will change it in all others as well.
8. Click Apply.
9. Click Done.

Result

Quick filters are displayed in the Recruiting Center for the selected requisition or candidate list format context.

Quick Filters in the Requisitions Lists

In the following table, the check mark indicates that a quick filter is available in the requisitions list and/or mini requisitions list.
The Status quick filter is considered a multi-select within the same field and acts as an OR filter. For example, when selecting the Draft and Open status filters, the user will see all requisitions that are either in Draft or Open status.

### Quick Filters in the Candidates Lists

In the following table, the check mark indicates that a quick filter is available in candidates lists.

<table>
<thead>
<tr>
<th>Quick Filter</th>
<th>All Candidates by Requisition</th>
<th>All Candidates By Folder</th>
<th>All Candidates By Offer</th>
<th>Requisition Specific Candidate List</th>
<th>Search Results - Quick or Advanced</th>
<th>List of automatically pooled candidates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidates - Internal</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Candidates - Referred</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Candidates - Requiring Attention</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Candidates - In selection Process</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Candidates - Active on Current Requisition</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Candidates - Active on concurrent requisition</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Candidates - Exclude disqualified</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quick Filter</td>
<td>All Candidates by Requisition</td>
<td>All Candidates By Folder</td>
<td>All Candidates By Offer</td>
<td>Requisition Specific Candidate List</td>
<td>Search Results - Quick or Advanced</td>
<td>List of automatically pooled candidates</td>
</tr>
<tr>
<td>--------------</td>
<td>-------------------------------</td>
<td>--------------------------</td>
<td>-------------------------</td>
<td>-----------------------------------</td>
<td>-----------------------------------</td>
<td>---------------------------------------------</td>
</tr>
<tr>
<td>Candidates - New in selection process</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submissions - Submission completed</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submissions - Meet required criteria</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submissions - ACE</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submissions - Assets Met</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submissions - Results between %</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submissions - Creation Date</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submissions - Completion Date</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submissions - Last Activity Date</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Submissions - Step</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submissions - Status</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submissions - Employer</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Submissions - Program</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Submissions - Radius</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Requisitions - Status</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Requisitions - Organization</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Requisitions - Primary location</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quick Filter</td>
<td>All Candidates by Requisition</td>
<td>All Candidates By Folder</td>
<td>All Candidates By Offer</td>
<td>Requisition Specific Candidate List</td>
<td>Search Results - Quick or Advanced</td>
<td>List of automatically pooled candidates</td>
</tr>
<tr>
<td>--------------------------------------------------</td>
<td>-------------------------------</td>
<td>--------------------------</td>
<td>-------------------------</td>
<td>------------------------------------</td>
<td>-----------------------------------</td>
<td>----------------------------------------</td>
</tr>
<tr>
<td>Requisitions - Job Field</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Requisitions - Requisition ID</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Folder Name</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Offer Status</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shift</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Offer Dates: Creation, Start, Approval, Expiration &amp; Acceptance</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Candidates quick filters are considered a single select on different fields and act as an AND between the filters. For example, when selecting the Internal and Referred candidate filters, the user will only see the candidates that are Internal and Referred.

The Candidates - Active on Current Requisition filter will display any candidates in an active step/status (excluding any that are in a rejection, decline, or in hire step/status). The Candidates - In selection Process filter will display any candidates in an active step/status (excluding any that are in a rejection, decline, or in a hire step/status) and not flagged as disqualified based on disqualification questions.

**Quick Filters in the Tasks List**

The Tasks list provides quick filters to quickly filter the list down to relevant information.

<table>
<thead>
<tr>
<th>Quick Filter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show tasks for</td>
<td>Details on the “Assigned to me” filter are available below.</td>
</tr>
<tr>
<td>Requiring attention</td>
<td>Displays tasks that have an Attention Indicator Flag. Self-assigned tasks are the only type of tasks that do not have an Attention Indicator Flag because it is always the assignee who creates the task.</td>
</tr>
<tr>
<td>Hide completed tasks</td>
<td>Removes tasks that have the Completed status.</td>
</tr>
<tr>
<td>Due date</td>
<td>Displays tasks for which the due date matches the selected value (All, Next Week, Today, Overdue). When the option “Exclude task without due date” is selected, tasks without a due date will not appear in the list.</td>
</tr>
<tr>
<td>Task type</td>
<td>Displays the type of task selected. If no task type is specified, all task types appear in the list.</td>
</tr>
<tr>
<td>Quick Filter</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------</td>
<td>---------------------------------------------------------------</td>
</tr>
<tr>
<td>Related to Candidate</td>
<td>Displays tasks related to the selected candidate.</td>
</tr>
<tr>
<td>Related to Requisition</td>
<td>Displays tasks related to the selected requisition.</td>
</tr>
<tr>
<td>Related to Assignee</td>
<td>Displays tasks related to the selected user.</td>
</tr>
</tbody>
</table>

"Assigned to me" filter

The "Assigned to me" filter was created to eliminate the confusion of mixing tasks that users own with tasks that users might not own, but are for requisitions they own. The filter is available in the Tasks channel and in the Tasks list. In the Tasks channel, the "Tasks assigned to me" link is available to quickly access tasks assigned to the user. In the Tasks list, the filter "Assigned to me" is available via the "Show tasks for" list. The value "Assigned to me" is the default value when accessing the Tasks list.

When a Self-assigned Task link is clicked in the Tasks channel, users are brought to the Tasks list; the "Assigned to me" value is selected in the "Show tasks for" filter no matter what the "Show information for" filter on the My Taleo page is set to.

When any of other task link is clicked (for example, under Requisition, Candidate, Offer), users are brought to the Tasks list; the value in the "Show tasks for" filter is identical to the value selected in the "Show information for" filter of the My Taleo page. Example: If "I own" is selected in the "Show information for" filter on the My Taleo page, then "Requisitions I own" is selected in the "Show tasks for" filter in the Tasks list. If a group is selected in the "Show information for" filter on the My Taleo page, then the same group is selected in the Tasks list.

If users have the ability to see and change the "Show information for" filter setting, once in the Tasks list they can change it to what they wish to see. If they don’t have access to this filter, then they will need to navigate back to the Tasks channel and click on the task they want to see in order to have the Tasks list filtered for them.

The Show information for Default Value setting that can be set in a configuration profile has no effect on the Tasks list view and the Tasks channel view.
Advanced Filters

Advanced filters help Recruiting Center users to filter lists using an expansive set of filtering criteria.

Both requisitions and candidates lists have an Advanced Filters button in the left panel, at the very bottom of the page which provides access to advanced filtering criteria. Recruiting Center users can select several advanced filter criteria to filter a list. Once executed, the criteria are presented to the user across the top of the screen with an adjacent to the filter criteria. By clicking , the criteria can be removed and the list will dynamically update according to the updated criteria set. User-defined fields can also be available as filtering criteria.

Advanced filters are filtering on an already filtered list, that is whatever advanced filter criteria is selected, the list will be filtered based on what is already displayed in the list. For example, a user filters a requisitions list using the Pending, Open and On Hold status quick filters (he does not select the Draft status filter). The user then applies the advanced filter “Status Details/Draft”. The list will display “No matches found”. In this example, the system first displays all requisitions except Draft ones. Then, from the results displayed by the quick filters, the system finds those requisitions that are draft.

When using advanced filters for which words must be entered, users have the ability to enter partial words. For example, a user could filter a candidate list with candidates whose first name starts with “cath”. The system would retrieve candidates whose first name is “cathy”, “catherine” or “cathia”.

Advanced Filter - Keyword

When using the Keyword advanced filter in a requisitions list, the system looks through this content of the requisition file:

- Requisition number
- Requisition title
- Requisition title by manager
- Requisition internal description
- Requisition external description
- Job board summary description
- Internal qualifications
- External qualifications
- Abstract
- Additional information
- Department
- Position
- Requisition/Job Information UDF
- Offer UDF
Displaying Advanced Filters in a List

Prerequisite

Configuration > [Recruiting] Administration > List Formats

Steps

1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. Select Show Advanced Filters.
5. Click Done.

Result

The Advanced Filters button is displayed in the Recruiting Center for the selected candidate or requisition list format context. Note that criteria available in advanced filters are pre-defined by the system based on the columns selected for the list format context. You cannot modify them. For details, see Advanced Filters.
Show Filters

The Show filter allows Recruiting Center users to filter information displayed in a list using ownership, collaboration or status criteria.

The Show filter can appear in:

- Requisitions list.
- Candidates list.
- Tasks list.
- Home page.

The Show filter:

- Can be displayed everywhere except in the home page.
- Can be displayed everywhere including the home page.
- Can be hidden.

Values appearing in the Show filter depend on the permissions granted to the user and on the configuration of the application. Available values are the same for all three pages where the Show filters can appear. Possible values are:

- I own
- I collaborate on
- I own or collaborate on
- I own or collaborate on or in My coverage area
- Groups the user is part of
- All

For example:

- If a user’s permissions does not allow a user to see requisitions he/she does not own, the user will only see the “I own” value.
- If a user’s permissions allow a user to see requisitions he/she does not own BUT the collaborator feature is not available in the company, the user will not see the following values related to the collaborator feature: “I own or collaborate on”, “I collaborate on” and “I own or collaborate on or in My coverage area”.
- If a user’s permissions allow the user to see requisitions he/she does not own AND the collaborator feature is available in the company, the user will see the following values related to the collaborator feature: “I own or collaborate on”, “I collaborate on” and “I own or collaborate on or in My coverage area”.

When displaying the Candidates list, a check box called Include inactive requisitions since appears just underneath the Show filter. Selecting this check box will add to the Requisitions list the Deleted, Canceled and Filled requisitions.

Displaying the Show Filter

The following settings are used to configure the Show Filter.
<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show information for Filter Visibility</td>
<td>To set whether the Show filter control is displayed on lists and the home page. If you think users will not need to change the value of the Show filter, consider not displaying the Show filter to them.</td>
<td>Everywhere including in the home page</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] Configuration Profiles</td>
</tr>
<tr>
<td>Show information for Filter Default</td>
<td>To set the default value for the Show filter, which controls what requisitions are included in the Recruiting requisition list and center stage channels. If you want to ensure users see relevant requisitions without having to change the filter each time, do not display the Show filter.</td>
<td>I own</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] Configuration Profiles</td>
</tr>
<tr>
<td>Topic</td>
<td>Page</td>
<td></td>
<td></td>
</tr>
<tr>
<td>------------------------</td>
<td>------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fields</td>
<td>143</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Requisition Template Fields</td>
<td>160</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Selection Lists</td>
<td>161</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Field Layout</td>
<td>167</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Fields

Field

The Recruiting Center uses both standard fields supplied by the system as well as user-defined fields (UDFs) created by your organization to capture any additional information.

There are two types of fields available in the product:

- Standard fields supplied by the system which include standardized information on candidates, requisitions, offers, etc.
- User-defined fields (UDF) created by system administrators to capture information that their business requires.

Various properties can be applied to both standard fields and user-defined fields:

- Availability: Where the field is used, that is the Recruiting Center, career sections, the candidate search feature, the History tab, reports (for UDFs). See Field Availability.
- Personally Identifiable Information (in Career Sections): This option is available for the Date of Birth, Social Security Number, and candidate user-defined fields. When the option is selected, if candidates enter a value in these fields and save the page, the value is no longer displayed in the field and asterisks are displayed in place of the value on the Summary page. See Masking Values for Date of Birth, Social Security Number and Candidate UDFs.
- Content required: The content of a field may be required to save, approve (requisition fields only), or source (requisition fields only) and users must enter information in the field in order to proceed. If content is not required, users do not have to enter any information in the field.
- Security level: Each field is associated to a security level to restrict access or viewing of a field. Security levels are General, Restricted, or Confidential. See Field Security Level.
- Organizations, Locations and Job Fields contextualization: To make fields relevant according to a context. See Field Contextualization.
- Staffing type exceptions: An exception regarding a staffing type, that is Professional, Hourly, Campus, Contingent, Executives. See Field Staffing Type Exception.

Fields are divided into four categories based on where they are used in the Recruiting Center:

- Candidate
- Department
- Offer
- Requisition

There are limitations to the number of user-defined fields (UDF) that can be created. The default maximum number of UDFs is 100 per category of fields. Examples of category of fields are Requisition, Candidate, Offer, Department, Work Experience, Education, etc. There is a limit of 100 reportable UDFs per business entity. If a customer wants more than 100 UDFs, the customer will need to enter a service request with Oracle Support.

Field Availability

Fields can be made available for use in the Recruiting Center, career sections, the candidate advanced search feature, the History tab, and reports (for UDFs).

The availability of a field varies by field category. In the following table, the check mark indicates where categories of fields are available.
### Field Security Level

Each field is associated to a security level to restrict access or viewing of a field.

When configuring fields, system administrators specify the security level of a field.

<table>
<thead>
<tr>
<th>Security Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
<td>No security, fields can be viewed and edited. It is the most basic security level; most fields have this level by default.</td>
</tr>
<tr>
<td>Restricted</td>
<td>Medium security, most users can view the fields, but only designated users can edit them. It is used to restrict specific users from either viewing or editing the information.</td>
</tr>
<tr>
<td>Confidential</td>
<td>Top secret security, only designated users can view and edit the fields. This is a confidentiality level beyond the Restricted security level that can be used to restrict users from viewing and/or editing the information, especially sensitive information. Two fields are marked as Confidential by default: Social Security Number and Date of Birth.</td>
</tr>
</tbody>
</table>

Some requisition fields are always visible regardless of their security level. This allows control over who can edit fields, but does not prevent visibility, important in most cases.

- Requisition ID
- Title
- Primary Location
- Organization
- Job Field
- Recruiter
- Hiring Manager

The security level of a field is also associated to the security level for requisitions, candidates and offers, in view mode and in edit mode. Note that for the above listed fields, the security level in view mode can be configured, but will not apply. Only the security level in edit mode will be applied. This is done via the following specific security level permissions:

<table>
<thead>
<tr>
<th>Availability</th>
<th>Candidate</th>
<th>Requisition</th>
<th>Offer</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taleo Recruiting</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Career Section</td>
<td>✔</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Candidate Search</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>History</td>
<td></td>
<td></td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Custom Report</td>
<td>✔</td>
<td>✔</td>
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</tr>
</tbody>
</table>

See *Defining the Availability of a Field.*
<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Security level for requisitions (in view mode)</td>
<td>Configuration &gt; [SmartOrg] Administration&gt; User Types &gt; Recruiting &gt; Requisitions &gt; General</td>
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<td>Configuration &gt; [SmartOrg] Administration&gt; User Types &gt; Recruiting &gt; Offers &gt; General</td>
</tr>
<tr>
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<td>Configuration &gt; [SmartOrg] Administration&gt; User Types &gt; Recruiting &gt; Offers &gt; General</td>
</tr>
</tbody>
</table>

When defining a user type, system administrators need to decide which security level will be granted for these specific permissions. Each user type has one of the above security levels associated to it to define if the user type has a general, restricted or confidential access to information.

The security level of a field can be modified at any time, thus impacting the user types associated to that security level.

At a high level, the user type permissions work as follows:

- Users having the “general” permission access will only see/edit fields set at the “general” security level.
- Users having the “restricted” permission access will see/edit fields set at the “general” and “restricted” security levels.
- Users having the “confidential” permission access will see/edit fields set at all security levels, that is “general”, “restricted”, and “confidential”.

For example, a hiring manager might have a view and edit access to general requisition fields, a view only access to restricted requisition fields and no access at all to confidential requisition fields, while having a view only access to general offer fields.

More specifically the behaviors of these permissions are:

- Restricted/Confidential fields in View mode in the file:
  If a field is at a higher security level than the user has access to view, the field will not be displayed to the user.
- Restricted/Confidential fields in Edit mode in the file:
  If a field is at a higher security level than the user has access to edit, but the field security level gives them access to view it, then the field will be in read only mode in the edit. If a field is at a higher security level than the user has access to edit or view, then the field will not be displayed to the user.
- Restricted/Confidential fields on the list:
  If a field is at a higher security level than the user has access to view for both external AND internal candidates, the user will see what he is allowed to see and an empty field will be displayed for the information
the user cannot see. If a field is at a higher security level than the user has access to view for either external OR internal, but not both, then the column will be displayed and the field will be empty for those candidates that the user is restricted from seeing the content, whether the field has data or not. As well, grouping by this field on the list will not be possible in this scenario.

• Restricted/Confidential fields in the advanced/quick filters of a list:

If a field is at a higher security level than the user has access to view for both external AND internal candidates, then the column will not be available in the advanced or quick filters. If a field is at a higher security level than the user has access to view for either external OR internal, but not both, then the column will be available in the advanced or quick filters. If the user filters using this field, then the system will filter as specified for the candidate type that they can view, but will not filter the candidate type that they are restricted from seeing the content and therefore will return all candidates for that type.

• Restricted/Confidential fields in the search (Quick/Advanced/Duplicate Check):

If a field is at a higher security level than the user has access to view for both external AND internal candidates, then the field will not be available in the search.

If a field is at a higher security level than the user has access to view for either external OR internal, but not both, then the field will be available in the search. If the user searches using this field, then the system will search as specified for the candidate type that they can see, but will not search the candidate type that they are restricted from seeing the content.

• Restricted/Confidential fields in message templates (correspondence):

If a field is at a higher security level than the user has access to view, then the user will not be able to send a message template that contains the restricted or confidential token.

Some candidate fields may automatically be set to Restricted or Confidential and should be reviewed and possibly edited to achieve the desired behavior. For example, by default many related personal information fields may be set to Restricted, and date of birth and social security number are always set to Confidential. It is important to review the state of these fields and ensure they are set properly according to the customer desired outcome.

Field Contextualization

Field contextualization resides in specifying the Organization-Location-Job Field structure for a field.

For each field, with the exception of fields set as mandatory by the system, system administrators can choose to define that a field is only available for a specific Organization, Location or Job Field. This means that outside of the defined structure, the field will not be visible.

Example of a requisition field contextualization: Let’s say your organization wants the “Citizenship Status” field to only appear in US jobs. To do that, the system administrator needs to associate the "Citizenship Status" field to the "United States" location (Configuration > [Recruiting] Administration > [Fields] Requisition > Citizenship Status > Edit Field Availability). When creating a requisition, the "Citizenship Status" field will only be available if the location of the requisition is the United States.

The contextualization of candidate fields in Career Sections will display based on the Organization-Location-Job Field of the requisition for which candidates are applying or based on the Organization-Location-Job Field in the candidate’s record if candidates are in a General Profile flow.

There are two ways for the Organization-Location-Job Field contextualization to get onto the general profile of a candidate.

• When the Organization-Location-Job Field block is part of the General Profile flow, then the candidate must make a selection on Organization-Location-Job Field.

• When a candidate applies on a requisition, the Organization-Location-Job Field for that requisition is added to the candidate’s General Profile.
Example of a candidate field contextualization: Let’s say your organization wants the “Social Security Number” field to appear for candidates applying to jobs in the US. To do that, the system administrator needs to associate the “Social Security Number” field to the “United States” location (Configuration > [Recruiting] Administration > [Fields] Candidate > Social Security Number > Edit Field Availability). With this contextualization:

- When a candidate applies for a job, the job must have the United States location in order for the Social Security Number field to be presented for completion.
- When a candidate creates a general profile, the candidate must have the United States location specified in his/her job preferences for the Social Security Number field to be presented for completion.
- When a recruiter views/edits (if authorized) a job submission, the Social Security Number field will not appear unless the job associated with the submission has a United States location.
- When a recruiter views/edits (if authorized) a candidate general profile, the Social Security Number field will not appear unless the candidate’s job preferences include a United States location.

The following fields cannot be contextualized or marked with various security level because they are mandatory to support the requisitions or candidates in the system: Creation Date, Last Modified Date, Requisition Number.

### Field Staffing Type Exception

A field can be associated to a given Organization-Location-Job Field structure for different staffing types.

An exception regarding the staffing type (Professional, Hourly, Campus, Contingent, Executives) can be created for a field. System administrators can define an Organization-Location-Job Field structure specifically for staffing types where specific contextualization is required. When doing this, system administrators are able to define new properties for the field as well as a new Organization-Location Job Field structure for the field for that staffing type. For example:

- A customer wants the Shift Availability Grid field to be visible for Hourly job submissions only. This would be done by modifying the property of the field to not available, and then adding an exception for the Hourly staffing type where the property for the field is set to available.
- A customer wants to set the Social Security Number field so that it does not appear on any candidate submissions except for Hourly submissions in the United States. This would be done by modifying the property for the field to not available, and then adding an exception for the Hourly staffing type where the property for the field is set to available and has the United States location linked to it.
- A customer wants to allow the designation of whether medical clearance is an employment precondition on all requisitions in the Medical Testing division except for executive jobs where clearance is only required for Medical Testing requisitions in China, the United States and the United Kingdom. The customer does NOT want this field to display in any other contexts. This would be done by making the field available for recruiting, linking the field to the Medical Testing organization, and then creating an exception for the Executives staffing type where the property of the field is set to available and is linked to the China, United Kingdom and United States locations and the Medical Testing organization.

### Modifying Standard Fields

The modification of a standard field consists of the following steps.

1. **Defining the availability of the field.**
2. **Associating the field to Organizations, Locations, Job Fields.**
3. **Creating a staffing type exception for the field.**
4. **Setting the field security level for requisitions, candidates, and offers.**
Defining the Availability of a Field

**Prerequisite**

*Configuration > [Recruiting] Administration > Fields*

**Steps**

1. Click a field category.
2. Click the name of a field.
3. Click Edit Field Availability.
4. Select where the field will be available: Recruiting Center, career sections, the candidate search feature, the History tab, and in reports (for user-defined fields).
5. For the Date of Birth, Social Security Number, and any candidate user-defined fields, the Personally Identifiable Information (in Career Sections) option is available. When selected, if candidates enter a value in these fields and save the page, the value is no longer displayed in the field and asterisks are displayed in place of the value on the Summary page. See *Masking Values for Date of Birth, Social Security Number and Candidate UDFs*.
6. Indicate if the content for the field is required to save, approve (requisition fields only), or source (requisition fields only) or if it is not required.
   
   Recruiting Center users will need to enter information in the field in order to proceed. If content is not required, users do not have to enter information in the field. If a field in a file is mandatory and the user is not authorized to edit the field because of the *security level* of the field, an error message will be displayed and the user will not be allowed to complete the transaction.
   
   Offer fields configured as required only apply in the context of a job offer (Offer Terms). As a result, offer fields are not required when users are creating other types of offers (that is, current job, competitive offer, expectations). Also, users permitted to create/edit supplementary offers are able to enter as much or as little data as they desire, and when creating a job offer they are required to complete any required fields prior to saving.
7. Specify the *security level* of the field, that is General, Restricted, or Confidential.
8. Click Save.

Associating a Field to an Organization, Location, and/or Job Field

**Prerequisite**

The *Enable Field Classification* setting must be enabled in the Recruiting settings.

*Configuration > [Recruiting] Administration > Fields*

**Steps**

1. Click a field category.
2. Click the name of a field.
3. Click Add next to Organizations, Locations, or Job Fields.
4. In the selector, select one or more elements.
5. Click Select.

**Result**

The organizations, locations, and job fields selected appear in the field page. The field is available in the Recruiting Center for an Organization-Location-Job Field structure context associated to the same organizations, locations, or job fields. For details, see *Field Contextualization*. 
Creating a Staffing Type Exception for a Field

**Prerequisite**

*Configuration > [Recruiting] Administration > Fields*

**Steps**

1. Click a field category.
2. Click the name of a field.
3. Click Add next to Exceptions.
4. Select a staffing type from the Staffing Types drop-down list.
5. Click Create.
6. If desired, click Add next to Organizations, Locations and/or Job Fields.
7. Select organizations, locations and/or job fields.
8. Click Select.

**Result**

The selected staffing type appears in the Exceptions section of the field page. The field will no longer be available when creating a user-defined form for a specific staffing type or Organization-Location-Job Field structure of a staffing type. For details, see *Field Staffing Type Exception*.

Setting the Field Security Level for Requisitions, Candidates, and Offers

The security level of a field is associated to the security level for requisitions, candidates and offers, in view mode and in edit mode.

This is done using the following security level permissions:

<table>
<thead>
<tr>
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<tbody>
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</tr>
</tbody>
</table>
Setting the Field Security Level for Requisitions

**Prerequisite**

*Configuration > [SmartOrg] Administration > User Types*

**Steps**

1. Click on a user type.
2. In the Recruiting functional domain, click Edit next to Requisitions.
3. Select the permission Security level for requisitions (in edit mode).
4. Set the desired security level.
5. Select the permission Security level for requisitions (in view mode).
6. Set the desired security level.
7. Click Save.

Setting the Field Security Level for Candidates

**Prerequisite**

*Configuration > [SmartOrg] Administration > User Types*

**Steps**

1. Click on a user type.
2. In the Recruiting functional domain, click Edit next to Candidates.
3. Select the permission Security level for internal candidates (in edit mode).
4. Set the desired security level.
5. Select the permission Security level for internal candidates (in view mode).
6. Set the desired security level.
7. Select the permission Security level for external candidates (in edit mode).
8. Set the desired security level.
9. Select the permission Security level for external candidates (in view mode).
10. Set the desired security level.
11. Click Save.

Setting the Field Security Level for Offers

**Prerequisite**

*Configuration > [SmartOrg] Administration > User Types*

**Steps**

1. Click on a user type.
2. In the Recruiting functional domain, click Edit next to Offers.
3. Select the permission Security level for offers (in edit mode).
4. Set the desired security level.
5. Select the permission Security level for offers (in view mode).
6. Set the desired security level.
7. Click Save.

Creating User-defined Fields

The creation of a user-defined field consists of the following steps.

1. Creating a user-defined field of type text, number, date, selection.
2. Defining the availability of the field.
3. Associating the field to Organizations, Locations, Job Fields.
4. Creating a staffing type exception for the field.
5. Setting the field security level for requisitions, candidates, and offers.

Creating a User-Defined Field

User-defined fields (UDF) can be created to collect information according to specific organization requirements.

The following types of user-defined fields can be created:

- Text and multilingual text
- Number
- Date
- Selection

Creating a User-Defined Field of Type "Text" or "Multilingual Text"

Prerequisite

Configuration > [Recruiting] Administration > Fields

Steps

1. Click a field category.
2. Click Create User-defined Field.
3. In the Type list, select Text or Multilingual Text.
4. Enter a name for the field.
   The name is used internally. It must be unique and without any spaces. Spaces can result in problems for integration with other HRIS applications. Underscores can be used.
5. Enter help text if you are creating a Candidate field.
   The help text will be displayed in the career section directly below the user-defined field, providing candidates with an explanation of the field. If using multiple languages, you will have to enter a translation of the help text for those languages. If translations are not provided, the system copies the help text into the other languages and adds the wording “not translated” at the end.
   The help text can contain up to 1000 characters (spaces count as characters). It is recommended, however, that help text be kept as short as possible to improve readability and to ensure that the text does not compete against more important information for the user’s attention.
6. Enter a label.
   This is the name that will be displayed to candidates in the career section, and to recruiters and hiring managers in the Recruiting Center.
7. Enter a short label.
This label name is used in lists. Short Label is not available for Department, Requisition, and Offer user-defined fields.

8. Enter information in the Attributes section.
   a) In the Max. Num. Chars. field, enter a number to set the maximum number of characters in this field.
   b) In the Width field, enter a number to set the width of the field in terms of characters. For example, a value of 20 means that the field will be 20-character wide.
   c) In the Num. of lines field, enter a total number of lines for this field.
   d) In the Default field, enter the default text that will appear in the Text field when it is displayed. The text must respect the format settings listed previously.

9. Translate the field into all available languages. Languages are available at the upper right of the page.
10. Click Save.

Creating a User-Defined Field of Type "Number"

Prerequisite

Configuration > [Recruiting] Administration > Fields

Steps

1. Click a field category.
2. Click Create User-defined Field.
3. In the Type list, select Number.
4. Enter a name for the field.
   The name is used internally. It must be unique and without any spaces. Spaces can result in problems for integration with other HRIS applications. Underscores can be used.
5. Enter a label.
   This is the name that will be displayed to candidates in the career section, and to recruiters and hiring managers in the Recruiting Center.
6. Enter a short label.
   This label name is used in lists. Short Label is not available for Department, Requisition and Offer user-defined fields.
7. Enter information in the Attributes section.
   a) In the Specific Number Type field, select a number type: Not Specified, Number, Amount.
      In you selected Not Specified, enter in the Num. of Decimals field a number to set the maximum number of decimals in this field (numeric value only). Decimals count as digits. Therefore, the value entered in Num. of Decimals must be lower than the number entered in the Maximum field.
   b) In the Width field, enter a number to set the width of the field in terms of characters. For example, a value of 20 means that the field will be 20-character wide.
   c) In the Maximum field, enter a number to set the maximum number of digits in this field, including decimals.
   d) In the Default field, enter the number that will appear in the Number field by default. This number must reflect the settings entered previously. The Default value must be equal to, or higher, or lower than the maximum number of digits.
8. Translate the field into all available languages. Languages are available at the upper right of the page.
9. Click Save.
Creating a User-Defined Field of Type "Date"

Prerequisite

Configuration > [Recruiting] Administration > Fields

Steps

1. Click a field category.
2. Click Create User-defined Field.
3. In the Type list, select Date.
4. Enter a name for the field.
   The name is used internally. It must be unique and without any spaces. Spaces can result in problems for integration with other HRIS applications. Underscores can be used.
5. Enter a label.
   This is the name that will be displayed to candidates in the career section, and to recruiters and hiring managers in the Recruiting Center.
6. Enter a short label.
   This label name is used in lists. Short Label is not available for Department, Requisition and Offer user-defined fields.
7. Enter information in the Attributes section.
   a) In the First Year in Range field, select the earliest year to be displayed.
   b) In the Last Year in Range field, select the last year to be displayed.
   c) In the Display Order field, select the order in which the years will be displayed.
   d) Select Day Displayed option to display the day.
8. Translate the field into all available languages. Languages are available at the upper right of the page.
9. Click Save.

Creating a User-Defined Field of Type "Selection"

Prerequisite

Configuration > [Recruiting] Administration > Fields

Steps

1. Click a field category.
2. Click Create User-defined Field.
3. In the Type list, select Selection.
4. Enter a name for the field.
   The name is used internally. It must be unique and without any spaces. Spaces can result in problems for integration with other HRIS applications. Underscores can be used.
5. Enter a label.
   This is the name that will be displayed to candidates in the career section, and to recruiters and hiring managers in the Recruiting Center.
6. Enter a short label.
   This label name is used in lists. Short Label is not available for Department, Requisition and Offer user-defined fields.
7. In the New/Modified Element field, enter a value for the selection then click Apply. The newly created value appears in the Available Elements list.
8. Repeat step 7 for all the values in the selection.
9. Activate the values by selecting each value and clicking Add.
10. If you want one of the value to be selected by default, select the value in the Active Elements list, then select the Default option. The word Default appears in parenthesis beside the value.
11. Indicate if you want the selection to be of type single answer or multiple answers.
12. Translate the selection into all available languages. Languages are available at the upper right of the page.
13. Click Save.

### Defining the Availability of a Field

**Prerequisite**

*Configuration > [Recruiting] Administration > Fields*

**Steps**

1. Click a field category.
2. Click the name of a field.
3. Click Edit Field Availability.
4. Select where the field will be available: Recruiting Center, career sections, the candidate search feature, the History tab, and in reports (for user-defined fields).
5. For the Date of Birth, Social Security Number, and any candidate user-defined fields, the Personally Identifiable Information (in Career Sections) option is available. When selected, if candidates enter a value in these fields and save the page, the value is no longer displayed in the field and asterisks are displayed in place of the value on the Summary page. See [Masking Values for Date of Birth, Social Security Number and Candidate UDFs](#).
6. Indicate if the content for the field is required to save, approve (requisition fields only), or source (requisition fields only) or if it is not required. Recruiting Center users will need to enter information in the field in order to proceed. If content is not required, users do not have to enter information in the field. If a field in a file is mandatory and the user is not authorized to edit the field because of the *security level* of the field, an error message will be displayed and the user will not be allowed to complete the transaction. Offer fields configured as required only apply in the context of a job offer (Offer Terms). As a result, offer fields are not required when users are creating other types of offers (that is, current job, competitive offer, expectations). Also, users permitted to create/edit supplementary offers are able to enter as much or as little data as they desire, and when creating a job offer they are required to complete any required fields prior to saving.
7. Specify the *security level* of the field, that is General, Restricted, or Confidential.
8. Click Save.

### Associating a Field to an Organization, Location, and/or Job Field

**Prerequisite**

The *Enable Field Classification* setting must be enabled in the Recruiting settings.
Steps
1. Click a field category.
2. Click the name of a field.
3. Click Add next to Organizations, Locations, or Job Fields.
4. In the selector, select one or more elements.
5. Click Select.

Result
The organizations, locations and job fields selected appear in the field page. The field is available in the Recruiting Center for an Organization-Location-Job Field structure context associated to the same organizations, locations or job fields. For details, see Field Contextualization.

Creating a Staffing Type Exception for a Field
Prerequisite
Steps
1. Click a field category.
2. Click the name of a field.
3. Click Add next to Exceptions.
4. Select a staffing type from the Staffing Types drop-down list.
5. Click Create.
6. If desired, click Add next to Organizations, Locations and/or Job Fields.
7. Select organizations, locations and/or job fields.
8. Click Select.

Result
The selected staffing type appears in the Exceptions section of the field page. The field will no longer be available when creating a user-defined form for a specific staffing type or Organization-Location-Job Field structure of a staffing type. For details, see Field Staffing Type Exception.

Setting the Field Security Level for Requisitions, Candidates, and Offers
The security level of a field is associated to the security level for requisitions, candidates and offers, in view mode and in edit mode.

This is done using the following security level permissions:

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</tbody>
</table>

**Setting the Field Security Level for Requisitions**

**Prerequisite**

*Configuration > [SmartOrg] Administration > User Types*

**Steps**

1. Click on a user type.
2. In the Recruiting functional domain, click Edit next to Requisitions.
3. Select the permission Security level for requisitions (in edit mode).
4. Set the desired security level.
5. Select the permission Security level for requisitions (in view mode).
6. Set the desired security level.
7. Click Save.

**Setting the Field Security Level for Candidates**

**Prerequisite**

*Configuration > [SmartOrg] Administration > User Types*

**Steps**

1. Click on a user type.
2. In the Recruiting functional domain, click Edit next to Candidates.
3. Select the permission Security level for internal candidates (in edit mode).
4. Set the desired security level.
5. Select the permission Security level for internal candidates (in view mode).
6. Set the desired security level.
7. Select the permission Security level for external candidates (in edit mode).
8. Set the desired security level.
9. Select the permission Security level for external candidates (in view mode).
10. Set the desired security level.
11. Click Save.

Setting the Field Security Level for Offers

Prerequisite

*Configuration > [SmartOrg] Administration > User Types*

Steps
1. Click on a user type.
2. In the Recruiting functional domain, click Edit next to Offers.
3. Select the permission Security level for offers (in edit mode).
4. Set the desired security level.
5. Select the permission Security level for offers (in view mode).
6. Set the desired security level.
7. Click Save.

Field - Other Configuration Tasks

Deleting a Field

Prerequisite

Only user-defined fields can be deleted.

*Configuration > [Recruiting] Administration > Fields*

Steps
1. Click a field category.
2. Click Show Custom Fields.
3. Click Delete next to the field to be deleted.
4. Click Done.

Dissociating a Field from an Organization, Location, Job Field

Prerequisite

The *Enable Field Classification* setting must be enabled in the Recruiting settings.

*Configuration > [Recruiting] Administration > Fields*

Steps
1. Click a field category.
2. Click the name of a field.
3. Click Remove next to an organization, location, or job field.

Result

The field selected no longer appears in the field page. The field will be available in the Recruiting Center for all Organization-Location-Job Field structures.
Removing a Staffing Type Exception for a Field

Prerequisite

Configuration > [Recruiting] Administration > Fields

Steps
1. Click a field category.
2. Click the name of a field.
3. Click Remove next to an exception.

Result
The field is available when creating a user-defined form for a specific staffing type or Organization-Location-Job Field structure of a staffing type.

Masking Values for Date of Birth, Social Security Number and Candidate UDFs

The Date of Birth, Social Security Number, and candidate user-defined fields can be configured such that if candidates enter a value in the field and save the page, the value is no longer displayed in the field and asterisks are displayed in place of the value on the Summary page.

If candidates edit their candidate profile or the job-specific application after saving a page containing fields configured for masking, they have to reenter the information in these fields because the existing values will have been cleared. If candidates neglect to reenter the information, a warning message lists the cleared fields and invites the candidates to reenter values.

Similarly, if candidates fill out other job-specific applications on the same career section and the corresponding application workflows contain fields configured for masking, the candidates have to reenter the values if they want to include them in the job submission. If candidates neglect to reenter the information, a warning message lists the empty fields and invites the candidates to reenter values.

Candidate user-defined fields that can be configured for masking can be of Text, Multilingual Text, Selection, Date, Number or Boolean type. The values that candidates enter will be masked in the following blocks of application flows that include them: Candidate Personal Information, Referrer Personal Information, Personal Information-Agency, Education, Work Experience, Basic Profile Information.

Because candidates are obliged to reenter information in fields configured for masking each time they edit their general profile or apply for jobs, configuring fields in this manner can have a negative impact on the candidate experience. The inclusion of such fields in "primary" flows is therefore not recommended. Date of Birth, Social Security Number and candidate user-defined fields configured for masking (if included at all) are more suitable for "secondary" flows such as Invitation to Self-Identify and Request More Info.

Masking Values for Date of Birth, Social Security Number and Candidate UDFs

Prerequisite

Configuration > [Recruiting] Administration > Fields

Steps
1. Click the Candidate link.
2. Click the Date of Birth field, the Social Security Number field, or any candidate user-defined field.
3. Click Edit Field Availability.
4. Select the Personally Identifiable Information (in Career Sections) option.
5. Click Save.

**Result**

If candidates enter a value in these fields and save the page, the value is no longer displayed in the field and asterisks are displayed in place of the value on the Summary page.

### Field - Permissions and Settings

The following permissions and settings can be used to configure fields.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Field Classification</td>
<td>Determines if fields can be classified by Organizations, Locations, and Job Fields.</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Maximum Number of UDFs</td>
<td>This is a Private setting. The maximum number of available custom fields for any entity of the suite.</td>
<td>100</td>
<td>Configuration &gt; [General Configuration] Settings</td>
</tr>
</tbody>
</table>

The following permissions are used to associate the field security level for requisitions, candidates and offers, in view mode and in edit mode.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Security level for requisitions (in view mode)</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Requisitions &gt; General</td>
</tr>
<tr>
<td>Security level for requisitions (in edit mode)</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Requisitions &gt; General</td>
</tr>
<tr>
<td>Security level for internal candidates (in view mode)</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Candidates &gt; General</td>
</tr>
<tr>
<td>Security level for external candidates (in view mode)</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Candidates &gt; General</td>
</tr>
<tr>
<td>Security level for internal candidates (in edit mode)</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Candidates &gt; General</td>
</tr>
<tr>
<td>Security level for external candidates (in edit mode)</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Candidates &gt; General</td>
</tr>
<tr>
<td>Security level for offers (in view mode)</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Offers &gt; General</td>
</tr>
<tr>
<td>Security level for offers (in edit mode)</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Offers &gt; General</td>
</tr>
</tbody>
</table>
Requisition Template Fields

Requisition Template Job Code Field

Requisition templates can be assigned a job code.

Customers not using the Job Code field can deactivate it. When the Job Code field is deactivated:

- The Code column does not appear in lists.
- The Job Code field does not appear in files, in view or edit modes. It does not appear in the Requisition Templates list and cannot be included in the configurable Requisition lists.
- The Job Code field is not available in selectors.
- The Job Code field does not appear in callouts.

Deactivating the Requisition Template Job Code Field

**Prerequisite**

*Configuration > [Recruiting] Administration > Fields*

**Steps**

1. Click Requisition Template.
2. Click Job Code.
3. Click Edit Field Availability.
4. Do not check the Taleo Recruiting option.
   - Note that the Security Level and Content Required options cannot be configured. This is why they are grayed out. Also, no Organization-Location-Job Field contextualization and no staffing type exception can be specified.
5. Click Save.

**Result**

The Job Code field is deactivated and is not displayed in the Recruiting Center.
Selection Lists

Global Selection List

A global selection list is a list of elements (values) used to define a field, that can be used by several Taleo products and that can only be viewed and edited.

These global selection lists are available in the Configuration menu, under Selection Lists:

- Education Levels
- Employee Statuses
- Job Levels
- Job Types
- Schedules
- Shifts
- Travels
- Currencies

Global selection lists can be edited, that is system-defined items can be added or removed. Users will only see the items selected by the system administrator.

Recruiting Selection List

A recruiting selection list is a list of elements (values) used to define a field, that can be used in the Recruiting Center and that can be viewed, edited, and created.

The following types of selections are available:

- **Small Selection - Standard**: A predefined selection provided by the system. The selection provides a few elements and is represented by a radio button or a drop-down list. These selections can only be modified, that is elements in the selection can be created, added, or removed. For certain small standard selections (for example, Advance Notice), system administrators can add and remove pre-defined elements. For others (like Commission Package, Option Package, Relocation Package and Stock Package), they can create new elements.

- **Small Selection - Custom**: A small selection created by system administrators to collect information for specific organization requirements.

- **Large Selection - Standard**: Large standard selections such as Employers, Institutions, RSlocations are predefined selections provided by the system. The selection provides a large number of elements and is represented by a quick search lookup.

- **Large Selection - Custom**: Large user-defined selections (LUDS) are created by system administrators. The selection provides a large number of elements and is represented by a quick search lookup. LUDS can be associated to Organizations, Locations, and Job Fields. The only goal of doing a OLF mapping is to filter down the list of possible values based on the OLF of the requisition. If there is no desire to filter down the values, it is suggested not to use such mapping.
Creating Large User-Defined Selections (LUDS)

The creation of large user-defined selections consists of the following steps:

1. **Creating the large user-defined selection.**
2. **Adding elements to the large user-defined selection.**
3. **Creating the user-defined field that will display the elements of the selection.**

Creating a Large User-Defined Selection

**Prerequisite**

*Configuration* → *[Recruiting] Administration* → *[Fields] Selection Lists*

**Steps**

1. Click the Large Selections tab, then the Custom tab.
2. Click New...
3. Enter a name and a code.
4. In the Language Requirements section, specify where descriptions are required.
   - If you select "Require descriptions in WebTop languages", the selection and its elements will be available in the Recruiting Center only.
   - If you select "Require descriptions in WebTop languages and content languages", the selection and its elements will be available in the Recruiting Center and Career Sections.

Once the large custom selection is created (including activated elements), it is no longer possible to edit this section.
5. Select Activate effective dating if you want selections to be activated for specific periods of time.
6. You may associate the selection to the Organization, Location, or Job Field structure. The only goal of doing a OLF mapping is to filter down the list of possible values based on the OLF of the requisition. If there is no desire to filter down the values, it is suggested not to use such mapping.
7. Select Require mapping for every element if you want every element to be mapped to the Associated Structure Type selected.
8. Translate the selection into all available languages. Languages are available at the upper right of the page.
9. Click Done.

Adding Elements to a Large User-Defined Selection

**Prerequisite**
The large selection must be created first.

**Configuration > [Recruiting] Administration > [Fields] Selection Lists**

**Steps**
1. Click the Large Selections tab, then the Custom tab.
2. Locate the large user-defined selection you just created.
3. Click the link (should display 0) located in the Number of Elements column.
4. In the Selection Element List page, click New...
5. Enter a code and a description.
6. Indicate if the element is always active or inactive.
7. Translate the element into all available languages. Languages are available at the upper right of the page.
8. Click Add.
9. Create as many elements as required.
10. Click Close.

**Result**
The new elements are added to the large user-defined selection.

Creating a User-Defined Field that Displays the Elements of a Selection

**Prerequisite**

**Configuration > [Recruiting] Administration > Fields**

**Steps**
1. Click on a field category.
2. Click Create User-defined Field.
3. In the Type list, select the large user-defined selection you created.
4. Enter a name for the field.
   The name is used internally. It must be unique and without any spaces. Spaces can result in problems for integration with other HRIS applications. Underscores can be used.
5. Enter a label.
   This is the name that will be displayed to candidates in the career section, and to recruiters and hiring managers in the Recruiting Center.
6. Enter a short label.  
   This label name is used in lists. Short Label is not available for Department, Requisition, and Offer user-defined fields.

7. Indicate if you want to display the code, description, or both in the Recruiting Center selector.

8. Indicate if you want to display the folder tree and the Start Date and End Date in the Recruiting Center selector.

9. Translate the field into all available languages. Languages are available at the upper right of the page.

10. Click Save.

Creating Small Custom Selections

The creation of small custom selections consists of the following steps:

1. Creating the small custom selection.
2. Creating the user-defined field that will display the elements of the selection.

Creating a Small Custom Selection

Prerequisite

*Configuration > [Recruiting] Administration > [Fields] Selection Lists*

Steps

1. Click the Small Selections tab, then the Custom tab.
2. Click New...
3. Enter a name for the selection.  
   The name must be unique. The name of the selection cannot be modified once the selection is saved.
4. In the New/Modified Element field, enter a value for the selection, then click Apply.
   The newly created value appears in the Available Elements list.
5. Repeat step 4 for all the values in the selection.
6. Activate the values by selecting each value in the Available Elements list and clicking Add. The values appear in the Active Elements section.
7. Order the values using the up and down arrows next to the Active Elements section.
8. Translate the selection into all available languages. Languages are available at the upper right of the page.
9. Click Done.

Result

The selection is available under Small Selections, Custom.

Creating a User-Defined Field that Displays the Elements of the Selection

Prerequisite

*Configuration > [Recruiting] Administration > Fields*

Steps

1. Click on a field category.
2. Click Create User-defined Field.
3. In the Type list, select the small custom selection you created.
4. Enter a name for the field.
The name is used internally. It must be unique and without any spaces. Spaces can result in problems for integration with other HRIS applications. Underscores can be used.
5. Enter a label.
This is the name that will be displayed to candidates in the career section, and to recruiters and hiring managers in the Recruiting Center.
6. Enter a short label.
This label name is used in lists. Short Label is not available for Department, Requisition, and Offer user-defined fields.
7. Indicate the type of answer available: single answer and multiple choice answer.
8. Translate the field into all available languages. Languages are available at the upper right of the page.
9. Click Save.

**Recruiting Selection List - Other Configuration Tasks**

**Deleting Large User-Defined Selections (LUDS)**

**Prerequisite**
The large selection must not be in use.

*Configuration > [Recruiting] Administration > [Fields] Selection Lists*

**Steps**
1. Click the Large Selections tab, then the Custom tab.
2. Select a selection.
3. Click .
4. Confirm the deletion.

**Result**
The large custom selection is no longer available under Large Selections, Custom.

**Removing Elements from Large User-Defined Selections (LUDS)**

**Prerequisite**
An element cannot be removed if it is being used.

*Configuration > [Recruiting] Administration > [Fields] Selection Lists*

**Steps**
1. Click the Large Selections tab, then the Custom tab.
2. Locate the desired selection.
3. Click the number located in the Number of Elements column.
4. In the Selection Element List page, select an element.
5. Click .
Deleting a Small Custom Selection

Prerequisite

*Configuration > [Recruiting] Administration > [Fields] Selection Lists*

Steps

1. Click the Small Selections tab and the Custom tab.
2. Click a selection name.
3. In the Selection Editor, click 🗑.
4. Confirm the deletion.
5. Click Done.

Result

The small selection is no longer available under Small Selections, Custom.

Removing an Element from a Small Custom/Standard Selection

Prerequisite

An element cannot be removed if it is being used.

*Configuration > [Recruiting] Administration > [Fields] Selection Lists*

Steps

1. Click the Small Selections tab and the Custom or Standard tab.
2. Click a selection name.
3. In the Active Elements list, select an element then click Remove.
4. Click Done.

Result

The element is no longer displayed in the Active Elements list.
Field Layout

Field Layout

Field layout consists in determining the position of standard and user-defined fields in offer forms, requisition files, and candidate files.

Field layout works differently depending on the type of field.

**Offer Field Layout:** Both standard and custom offer fields can be positioned in the offer form. The layout consists in specifying in which category/section of the offer form the field will be displayed (Top Section, General Terms, Bonuses, Details), which sequential field position it should occupy, and when it will be displayed (Always Displayed or Hidden by default if empty). Fields for a specific section must be sequentially grouped together. If a field is configured to display in any context, it will appear in the offer form and the system administrator will define the placement of the field. If a field is not configured to display in a given context, it will be omitted from the offer form and the rest of the fields will slide up in position to accommodate the field's absence.

Offer field layout configuration is available in the Offer Field Layout feature available in the Recruiting Administration.

**Department Field Layout:** Only custom department fields can be positioned in a department configuration page (Recruiting Administration > Department List). The layout consists in specifying the line and position where the field will appear in the department configuration page.

Department field layout configuration is available in the Department Field Layout feature available in the Recruiting Administration.

**Candidate and Requisition Field Layout:** To position candidate and requisition fields in a form, you need to create blocks of information (called user-defined forms) where you can place standard and custom fields intermixed within the same form.

Candidate and requisition field layout configuration is available in the User-defined Form feature available in the Recruiting Administration.

Adding a Field to the Offer Form

**Prerequisite**

Offer fields must first be created. See *Creating a User-defined Field.*

**Configuration** > [Recruiting] Administration > [Fields] Offer Field Layout

**Steps**

1. Click Add...
2. Select a field to include in the form.
3. Click Add.
4. Click Done.

**Result**

The field appears in the Field Layout - Offer page.
Positioning Fields in the Offer Form

Prerequisite
Both standard and custom offer fields can be positioned in the offer form.
For custom fields to appear in the Field Layout - Offer page, you must first create them. See Creating a User-defined Field.

Configuration  > [Recruiting] Administration  > [Fields] Offer Field Layout

Steps
1. In the Field Layout - Offer page, for each field select a value under Category to specify in which section of the form the field will be placed.
2. Select a number under Line to specify on which line in the section the field will be placed.
3. Click Apply.

Removing a Field from the Offer Form

Prerequisite
Custom offer fields must be included in the Offer form.

Configuration  > [Recruiting] Administration  > [Fields] Offer Field Layout

Steps
1. Select a field.
2. Click Remove.

Result
The field no longer appears in the Field Layout -Offer page.

Adding a Department Field in the Department Field Layout Page

Prerequisite
Custom department fields must first be created. See Creating a User-defined Field.

Configuration  > [Recruiting] Administration  > [Fields] Department Field Layout

Steps
1. Click Add...
2. Select a field to include in the form.
3. Click Add.
4. Click Done.

Positioning Department Fields in the Department Configuration Page

Prerequisite
Custom department fields must first be created. See Creating a User-defined Field.
Configuration > [Recruiting] Administration > [Fields] Department Field Layout

Steps

1. In the Field Layout - Department page, for each field select the line and position to determine the position of the field.
2. Click Apply.

Removing a Field from the Department Field Layout Page

Prerequisite
Custom department fields must be included in the form.

Configuration > [Recruiting] Administration > [Fields] Department Field Layout

Steps

1. Select a field.
2. Click Remove.
Forms and Files

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Requisitions and Candidate Files Configuration

Configuring Requisition Files

Requisition files are created with the combination of multiple forms and predefined blocks grouped within sections.

The configuration of a requisition file consists of the following steps:

1. Selecting the fields to include in the requisition file. You can use standard fields provided by Taleo or you can create your own user-defined fields.
2. Selecting the forms to include in the requisition file. You can modify existing forms or create user-defined forms from scratch.
3. Creating the requisition file.
4. Selecting the situation when the requisition file will be used.
5. Associating the requisition file to a staffing type.
6. Associating the requisition file to configuration profiles.
7. Granting permissions to create, view, and edit requisitions.

Creating a User-defined Field

Prerequisite

Configuration > [Recruiting] Administration > Fields

Steps

1. Click a field category.
2. Click Create User-defined Field.
3. In the Type list, select the type of field you want to create.
4. Enter a name for the field.
   The name is used internally. It must be unique and without any spaces. Spaces can result in problems for integration with other HRIS applications. Underscores can be used.
5. Enter help text if you are creating a Candidate field.
   The help text will be displayed in the career section directly below the user-defined field, providing candidates with an explanation of the field. If using multiple languages, you will have to enter a translation of the help text for those languages. If translations are not provided, the system copies the help text into the other languages and adds the wording “not translated” at the end.
   The help text can contain up to 1000 characters (spaces count as characters). It is recommended, however, that help text be kept as short as possible to improve readability and to ensure that the text does not compete against more important information for the user’s attention.
6. Enter a label.
   This is the name that will be displayed to candidates in the career section, and to recruiters and hiring managers in the Recruiting Center.
7. Enter a short label.
   This label name is used in lists. Short Label is not available for Department, Requisition, and Offer user-defined fields.
8. Enter information in the Attributes section.
9. Translate the field into all available languages. Languages are available at the upper right of the page.
10. Click Save.
11. Click Done.
12. In the list of fields, click the field you just created.
13. Click Edit Field Availability.
14. Select where the field will be available: Recruiting Center, career sections, the candidate search feature, the History tab, and in reports (for user-defined fields).
15. For candidate user-defined fields, the Personally Identifiable Information (in Career Sections) option is available. When selected, if candidates enter a value in these fields and save the page, the value is no longer displayed in the field and asterisks are displayed in place of the value on the Summary page. See Masking Values for Date of Birth, Social Security Number and Candidate UDFs.
16. Indicate if the content for the field is required to save, approve (requisition fields only), or source (requisition fields only) or if it is not required.
   Recruiting Center users will need to enter information in the field in order to proceed. If content is not required, users do not have to enter information in the field. If a field in a file is mandatory and the user is not authorized to edit the field because of the security level of the field, an error message will be displayed and the user will not be allowed to complete the transaction.
   Offer fields configured as required only apply in the context of a job offer (Offer Terms). As a result, offer fields are not required when users are creating other types of offers (that is, current job, competitive offer, expectations). Also, users permitted to create/edit supplementary offers are able to enter as much or as little data as they desire, and when creating a job offer they are required to complete any required fields prior to saving.
17. Specify the security level of the field, that is General, Restricted, or Confidential.
18. Click Save.
19. Click Add next to Organizations, Locations, or Job Fields to associate the field to Organizations, Locations and/or Job Fields.
20. Click Add next to Exceptions to create a staffing type exception.

Creating a User-defined Form

**Prerequisite**

*Configuration > [Recruiting] Administration > User-defined Forms*

**Steps**

1. Click Create.
2. Select a file type and click Next.
3. Select a form type and click Create. Or, if you want to use the default fields in the form type, select *Use the default template*.
4. Provide a code, a name, and a description.
5. Add rows, columns and sections using the Toolbox features.
6. In the Field Chooser list, select fields, then drag and drop them in the desired sections.
7. Edit the field properties by selecting a field and scrolling to the *Selected Element Properties* section at the bottom of the form.
8. Click Save.

**Result**

The form appears in the User-defined Forms list and is available when creating user-defined files.
Creating a Requisition File

Prerequisite

When creating a requisition file, the blocks in the Prescreening section must be placed in the following order: 1) Disqualification Questions 2) Competencies 3) Questions. Not all sections must be deployed, but when used they must be used in this relation to one another to ensure users do not encounter errors in the layout of the file.

Configuration > [Recruiting] Administration > User-defined Files

Steps

1. Click Create.
2. Select Requisition File in the drop-down list then click Create.
3. Provide a code and a name.
4. Provide a description to facilitate future references.
5. Determine how requisition approval and posting will be handled during the creation process of the file.
   • Without Assistants: This is the default value. There is no special behavior.
   • With Assistants: When this value is selected, Recruiting Center users will be prompted through the approval and posting pages upon saving and closing the requisition file provided the requisition is ready for approving and posting.
6. Click Save. The requisition file you just created is displayed.
7. If you want to add information on each of the requisition file tab, click Show next to Tab Management, then click on the tab name.
   The name of a tab in a user-defined file can be modified. You must send the new name to Oracle Support who will then activate the text for your zone. Contact Oracle Support for further information.
8. Create sections in the requisition file.
   a) Click Edit next to Section Ordering.
   b) Type the name of the section in the Add a Section field.
      The name of the section is viewable by Recruiting Center users when they are in view and edit modes within a file as well as in the file’s Table of Contents.
   c) Click Create Section. The new section appears on the right, under File.
9. Add blocks to the sections.
   a) In the Available Blocks section, select a block.
   b) Drag and drop the block in the section.
10. Click Save.
11. Click Activate.

Selecting the Situation When a Requisition File is Used

Prerequisite

The user-defined file must be created and activated.

Configuration > [Recruiting] Administration > Requisition File Setup

Steps

1. Click Edit.
2. For Requisition 1, select the situation when the requisition file will be used. For example, without posting.
3. Repeat the same process for Requisition File 2 and Requisition File 3.
4. Click Save.

**Associating a Requisition File to a Staffing Type**

**Prerequisite**

*Configuration &gt; [Recruiting] Administration &gt; Requisition File Setup*

**Steps**
1. Click Edit.
2. For Requisition File 1, click Add Staffing Type.
3. In the first drop-down list, select a requisition type.
4. In the second drop-down list, select the situation when the requisition file will be used.
5. Click Save.

**Associating a Requisition File to a Configuration Profile**

**Prerequisite**

*Configuration &gt; [SmartOrg] Administration &gt; Configuration Profiles*

**Steps**
1. Click a configuration profile.
2. Click the Requisition File Creation setting.
3. Click Edit.
4. Select the desired requisition file.
5. Click Save.

**Permissions to Create, View, and Edit Requisitions**

Permissions granted to Recruiting Center users so they can create, edit and view requisitions.

To create requisitions in the Recruiting Center, users must have the following permissions.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create requisitions</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Requisitions &gt; General</td>
</tr>
<tr>
<td>View requisitions</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Requisitions &gt; General</td>
</tr>
<tr>
<td>Allow access to n requisitions Note: For a requisition type currently active.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Requisitions &gt; Requisition Types</td>
</tr>
</tbody>
</table>

To view requisitions in the Recruiting Center, users must have the following permissions.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>View requisitions</td>
<td>Note that even if users can view requisitions “without restriction”, users will not be able to view requisitions</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions</td>
</tr>
</tbody>
</table>
To edit requisitions in the Recruiting Center, users must have the following permissions.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit requisitions</td>
<td>This permission also allows users to enter comments on requisitions they are allowed to edit. Users can also cancel requisitions with this permission. When users have the <em>Create requisitions</em> permission but not the <em>Edit requisitions</em> permission, they will be able to edit a requisition until it is saved. Once the requisition is saved, they cannot change any value. Also, for the Recruiter and Recruiter Assistant fields contained in a requisition, only users that have the <em>Edit requisitions</em> permission will be displayed in the User Selector. Users with the <em>Create requisitions</em> permission will not be displayed. Regardless of the security level for certain requisition fields while in edit mode, users with the <em>Create requisitions</em> permission are able to capture foundation data in the Create a Requisition wizard. Fields in the wizard are always editable regardless of their security level.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions</td>
</tr>
</tbody>
</table>

The "Edit requisitions" user type permission has two constraints:

- *But not if requisitions are in approval process*
- *But not if requisitions have been approved*

These two constraints do not take effect in the user’s current session; they will apply only at the user’s next login. This is because user type permissions are verified at login to determine what a user can access and the system does not know of the change until the credentials are verified again. For example, a user has the "Edit requisitions - But not if requisitions have been approved" permission. If a requisition changes from Draft to Approved during the user’s session, the user will still be able to edit the requisition or attach/remove files in the requisition until he/she logs out of the system.

Likewise, if a requisition was in the approval cycle during the user’s login and it then completes the approval cycle. If that user is not authorized to edit requisitions during the approval process, he/she may need to log out and back in again in order to regain the edit access to the requisition.
Configuring Requisition Templates

A requisition template is a requisition file containing information that will likely be reused for a similar job position. Requisition templates are created with the combination of multiple forms and predefined blocks grouped within sections.

The configuration of a requisition template consists of the following steps:

1. Selecting the fields to include in the requisition template. You can use standard fields provided by Taleo or you can create your own user-defined fields.
2. Selecting the forms to include in the requisition template. You can modify existing forms or create user-defined forms from scratch.
3. Creating the requisition template.
4. Selecting the situation when the requisition template will be used.
5. Associating the requisition template to a staffing type.
6. Granting permissions to create, view, and edit requisition templates.

Creating a User-defined Field

**Prerequisite**

*Configuration > [Recruiting] Administration > Fields*

**Steps**

1. Click a field category.
2. Click Create User-defined Field.
3. In the Type list, select the type of field you want to create.
4. Enter a name for the field.
   The name is used internally. It must be unique and without any spaces. Spaces can result in problems for integration with other HRIS applications. Underscores can be used.
5. Enter help text if you are creating a Candidate field.
   The help text will be displayed in the career section directly below the user-defined field, providing candidates with an explanation of the field. If using multiple languages, you will have to enter a translation of the help text for those languages. If translations are not provided, the system copies the help text into the other languages and adds the wording “not translated” at the end.
   The help text can contain up to 1000 characters (spaces count as characters). It is recommended, however, that help text be kept as short as possible to improve readability and to ensure that the text does not compete against more important information for the user’s attention.
6. Enter a label.
   This is the name that will be displayed to candidates in the career section, and to recruiters and hiring managers in the Recruiting Center.
7. Enter a short label.
   This label name is used in lists. Short Label is not available for Department, Requisition, and Offer user-defined fields.
8. Enter information in the Attributes section.
9. Translate the field into all available languages. Languages are available at the upper right of the page.
10. Click Save.
11. Click Done.
12. In the list of fields, click the field you just created.
13. Click Edit Field Availability.
14. Select where the field will be available: Recruiting Center, career sections, the candidate search feature, the History tab, and in reports (for user-defined fields).
15. For candidate user-defined fields, the Personally Identifiable Information (in Career Sections) option is available. When selected, if candidates enter a value in these fields and save the page, the value is no longer displayed in the field and asterisks are displayed in place of the value on the Summary page. See Masking Values for Date of Birth, Social Security Number and Candidate UDFs.
16. Indicate if the content for the field is required to save, approve (requisition fields only), or source (requisition fields only) or if it is not required.

Recruiting Center users will need to enter information in the field in order to proceed. If content is not required, users do not have to enter information in the field. If a field in a file is mandatory and the user is not authorized to edit the field because of the security level of the field, an error message will be displayed and the user will not be allowed to complete the transaction.

Offer fields configured as required only apply in the context of a job offer (Offer Terms). As a result, offer fields are not required when users are creating other types of offers (that is, current job, competitive offer, expectations). Also, users permitted to create/edit supplementary offers are able to enter as much or as little data as they desire, and when creating a job offer they are required to complete any required fields prior to saving.

17. Specify the security level of the field, that is General, Restricted, or Confidential.
18. Click Save.
19. Click Add next to Organizations, Locations, or Job Fields to associate the field to Organizations, Locations and/or Job Fields.
20. Click Add next to Exceptions to create a staffing type exception.

Creating a User-defined Form

Prerequisite

Configuration > [Recruiting] Administration > User-defined Forms

Steps

1. Click Create.
2. Select a file type and click Next.
3. Select a form type and click Create. Or, if you want to use the default fields in the form type, select Use the default template.
4. Provide a code, a name, and a description.
5. Add rows, columns and sections using the Toolbox features.
6. In the Field Chooser list, select fields, then drag and drop them in the desired sections.
7. Edit the field properties by selecting a field and scrolling to the Selected Element Properties section at the bottom of the form.
8. Click Save.

Result

The form appears in the User-defined Forms list and is available when creating user-defined files.
Creating a Requisition Template

**Prerequisite**

*Configuration > [Recruiting] Administration > User-defined Files*

**Steps**

1. Click Create.
2. Select Requisition Template in the drop-down list then click Create.
3. Provide a code and a name.
4. Provide a description to facilitate future references.
5. Click Save. The requisition template you just created is displayed.
6. If you want to add information on each of the requisition template tab, click Show next to Tab Management, then click on the tab name.
   The name of a tab in a user-defined file can be modified. You must send the new name to Oracle Support who will then activate the text for your zone. Contact Oracle Support for further information.
7. Create sections in the requisition template.
   a) Click Edit next to Section Ordering.
   b) Type the name of the section in the Add a Section field.
   The name of the section is viewable by Recruiting Center users when they are in view and edit modes within a file as well as in the file’s Table of Contents.
   c) Click Create Section. The new section appears on the right, under File.
8. Add blocks to the sections.
   a) In the Available Blocks section, select a block.
   b) Drag and drop the block in the section.
9. Click Save.
10. Click Activate.

Selecting the Situation When a Requisition Template is Used

**Prerequisite**

The user-defined file must be created and activated.

*Configuration > [Recruiting] Administration > Requisition File Setup*

**Steps**

1. Click Edit.
2. Under Requisition Template, select the situation when the requisition template will be used.
3. Click Save.

Associating a Requisition Template to a Staffing Type

**Prerequisite**

*Configuration > [Recruiting] Administration > Requisition File Setup*
### Steps
1. Click Edit.
2. Under Requisition Template, click Add Staffing Type.
3. In the first drop-down list, select a requisition template.
4. In the second drop-down list, select the situation when the requisition template will be used.
5. Click Save.

### Permissions to Create, View, and Edit Requisition Templates
Several permissions are related to requisition templates.

To create requisition templates in the Recruiting Center, users must have the following permissions.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create templates</td>
<td></td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions</td>
</tr>
<tr>
<td>Modify template information imported from HRMS</td>
<td></td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions</td>
</tr>
</tbody>
</table>

It is possible to configure the requisition template file to include the CSW designation. If it is not necessary to specify this field on the requisition template, it should not be included on the Template File configuration. When not included on the template, the legacy CSW configuration of workflow OLF contextualization will be honored. If the template contains a CSW field, the CSW defined on the template will override the definition of workflow contextualization in the CSW configuration area.

To view requisition templates in the Recruiting Center, users must have the following permission.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>View templates</td>
<td>This permission only controls the list of templates in the Requisition Templates Library. It does not control template selection within a requisition, which is based on the selected requisition type and Organization-Location-Job Field contextualization.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions</td>
</tr>
</tbody>
</table>

To edit requisition templates in the Recruiting Center, users must have the following permission.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit templates</td>
<td>Note that users are able to create requisition templates even if they do not have the Edit templates permission. Users will be able to fill the new template, save it, and modify it until the file has been closed. Once closed, it</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions</td>
</tr>
</tbody>
</table>
Configuring Candidate Files

Candidate files are created with the combination of multiple forms and predefined blocks grouped within sections.

The configuration of a candidate file consists of the following steps:
1. Selecting the fields to include in the candidate file. You can use standard fields provided by Taleo or you can create your own user-defined fields.
2. Selecting the forms to include in the candidate file. You can modify existing forms or create user-defined forms from scratch.
3. Creating the candidate file.
4. Selecting the situation when the candidate file will be used.
5. Associating the candidate file to a staffing type.

Creating a User-defined Field

Prerequisite
Configuration > [Recruiting] Administration > Fields

Steps
1. Click a field category.
2. Click Create User-defined Field.
3. In the Type list, select the type of field you want to create.
4. Enter a name for the field.
   The name is used internally. It must be unique and without any spaces. Spaces can result in problems for integration with other HRIS applications. Underscores can be used.
5. Enter help text if you are creating a Candidate field.
   The help text will be displayed in the career section directly below the user-defined field, providing candidates with an explanation of the field. If using multiple languages, you will have to enter a translation of the help text for those languages. If translations are not provided, the system copies the help text into the other languages and adds the wording “not translated” at the end.
   The help text can contain up to 1000 characters (spaces count as characters). It is recommended, however, that help text be kept as short as possible to improve readability and to ensure that the text does not compete against more important information for the user’s attention.
6. Enter a label.
   This is the name that will be displayed to candidates in the career section, and to recruiters and hiring managers in the Recruiting Center.
7. Enter a short label.
   This label name is used in lists. Short Label is not available for Department, Requisition, and Offer user-defined fields.
8. Enter information in the Attributes section.
9. Translate the field into all available languages. Languages are available at the upper right of the page.
10. Click Save.
11. Click Done.
12. In the list of fields, click the field you just created.
13. Click Edit Field Availability.
14. Select where the field will be available: Recruiting Center, career sections, the candidate search feature, the History tab, and in reports (for user-defined fields).
15. For candidate user-defined fields, the Personally Identifiable Information (in Career Sections) option is available. When selected, if candidates enter a value in these fields and save the page, the value is no longer displayed in the field and asterisks are displayed in place of the value on the Summary page. See Masking Values for Date of Birth, Social Security Number and Candidate UDFs.
16. Indicate if the content for the field is required to save, approve (requisition fields only), or source (requisition fields only) or if it is not required. Recruiting Center users will need to enter information in the field in order to proceed. If content is not required, users do not have to enter information in the field. If a field in a file is mandatory and the user is not authorized to edit the field because of the security level of the field, an error message will be displayed and the user will not be allowed to complete the transaction.
Offer fields configured as required only apply in the context of a job offer (Offer Terms). As a result, offer fields are not required when users are creating other types of offers (that is, current job, competitive offer, expectations). Also, users permitted to create/edit supplementary offers are able to enter as much or as little data as they desire, and when creating a job offer they are required to complete any required fields prior to saving.
17. Specify the security level of the field, that is General, Restricted, or Confidential.
18. Click Save.
19. Click Add next to Organizations, Locations, or Job Fields to associate the field to Organizations, Locations and/or Job Fields.
20. Click Add next to Exceptions to create a staffing type exception.

Creating a User-defined Form

Prerequisite
Configuration > [Recruiting] Administration > User-defined Forms

Steps
1. Click Create.
2. Select a file type and click Next.
3. Select a form type and click Create. Or, if you want to use the default fields in the form type, select Use the default template.
4. Provide a code, a name, and a description.
5. Add rows, columns and sections using the Toolbox features.
6. In the Field Chooser list, select fields, then drag and drop them in the desired sections.
7. Edit the field properties by selecting a field and scrolling to the Selected Element Properties section at the bottom of the form.
8. Click Save.

Result
The form appears in the User-defined Forms list and is available when creating user-defined files.
Creating a Candidate File

**Prerequisite**

*Configuration > [Recruiting] Administration > User-defined Files*

**Steps**

1. Click Create.
2. Select Candidate File in the drop-down list then click Create.
3. Provide a code and a name.
4. Provide a description to facilitate future references.
5. Click Save. The candidate file you just created is displayed.
6. If you want to add information on each of the candidate file tab, click Show next to Tab Management, then click on the tab name.
   
   The name of a tab in a user-defined file can be modified. You must send the new name to Oracle Support who will then activate the text for your zone. Contact Oracle Support for further information.
7. Create sections in the candidate file.
   
   a) Click Edit next to Section Ordering.
   b) Type the name of the section in the Add a Section field.
   
   The name of the section is viewable by Recruiting Center users when they are in view and edit modes within a file as well as in the file’s Table of Contents.
   c) Click Create Section. The new section appears on the right, under File.
8. Add blocks to the sections.
   
   a) In the Available Blocks section, select a block.
   b) Drag and drop the block in the section.
9. Click Save.
10. Click Activate.

Selecting the Situation when a Candidate File is Used

**Prerequisite**

User-defined files must first be created and activated.

*Configuration > [Recruiting] Administration > Candidate File Setup*

**Steps**

1. Click Edit.
2. Under Candidate File, for each situation, select the candidate file that will be used.
3. Click Save.

Associating the Candidate File to a Staffing Type

**Prerequisite**

*Configuration > [Recruiting] Administration > Candidate File Setup*
Steps
1. Click Edit.
2. Under Candidate File, for each situation, click Add Staffing Type.
3. In the first drop-down list, select a requisition type.
4. In the second drop-down list, select the situation when the file will be used.
5. Click Save.

Configuring the Create Candidate File

The Create Candidate feature is used when a recruiter receives a resume and wants to capture or enter the candidate’s information into the system. The Create Candidate action is available in the Recruiting Center home page (center stage) as well as in the candidates list via the More Actions menu.

The configuration of the Create Candidate feature consists of the following steps:
1. Selecting the fields to include in the candidate file. You can use standard fields provided by Taleo or you can create your own user-defined fields.
2. Selecting the forms to include in the candidate file. You can modify existing forms or create user-defined forms from scratch.
3. Creating the Create Candidate file.
4. Selecting the situation when the file will be used.
5. Associating the candidate file to a staffing type.
6. Associating the create candidate file to configuration profiles.
7. Granting the Create candidates permission (SmartOrg Administration > User Types > Recruiting > Candidates). When the permission is granted, the Create Candidate action is available in the Recruiting Center.
8. Granting the Attach a file (general) and Attach a file (on preselected candidates) permissions (SmartOrg Administration > User Types > Recruiting > Candidates).

Users must have the “Attach a file (general)” and “Attach a file (on preselected candidates)” permissions for the resume parsing option to work properly when creating a candidate.

Creating a User-defined Field

Prerequisite
Configuration > [Recruiting] Administration > Fields

Steps
1. Click a field category.
2. Click Create User-defined Field.
3. In the Type list, select the type of field you want to create.
4. Enter a name for the field.
   The name is used internally. It must be unique and without any spaces. Spaces can result in problems for integration with other HRIS applications. Underscores can be used.
5. Enter help text if you are creating a Candidate field.
   The help text will be displayed in the career section directly below the user-defined field, providing candidates with an explanation of the field. If using multiple languages, you will have to enter a translation of the help text for those languages. If translations are not provided, the system copies the help text into the other languages and adds the wording “not translated” at the end.
The help text can contain up to 1000 characters (spaces count as characters). It is recommended, however, that help text be kept as short as possible to improve readability and to ensure that the text does not compete against more important information for the user’s attention.

6. Enter a label.
   This is the name that will be displayed to candidates in the career section, and to recruiters and hiring managers in the Recruiting Center.

7. Enter a short label.
   This label name is used in lists. Short Label is not available for Department, Requisition, and Offer user-defined fields.

8. Enter information in the Attributes section.

9. Translate the field into all available languages. Languages are available at the upper right of the page.

10. Click Save.

11. Click Done.

12. In the list of fields, click the field you just created.

13. Click Edit Field Availability.

14. Select where the field will be available: Recruiting Center, career sections, the candidate search feature, the History tab, and in reports (for user-defined fields).

15. For candidate user-defined fields, the Personally Identifiable Information (in Career Sections) option is available. When selected, if candidates enter a value in these fields and save the page, the value is no longer displayed in the field and asterisks are displayed in place of the value on the Summary page. See Masking Values for Date of Birth, Social Security Number and Candidate UDFs.

16. Indicate if the content for the field is required to save, approve (requisition fields only), or source (requisition fields only) or if it is not required.
   Recruiting Center users will need to enter information in the field in order to proceed. If content is not required, users do not have to enter information in the field. If a field in a file is mandatory and the user is not authorized to edit the field because of the security level of the field, an error message will be displayed and the user will not be allowed to complete the transaction.
   Offer fields configured as required only apply in the context of a job offer (Offer Terms). As a result, offer fields are not required when users are creating other types of offers (that is, current job, competitive offer, expectations). Also, users permitted to create/edit supplementary offers are able to enter as much or as little data as they desire, and when creating a job offer they are required to complete any required fields prior to saving.

17. Specify the security level of the field, that is General, Restricted, or Confidential.

18. Click Save.

19. Click Add next to Organizations, Locations, or Job Fields to associate the field to Organizations, Locations and/or Job Fields.

20. Click Add next to Exceptions to create a staffing type exception.

Creating a User-defined Form

Prerequisite

Configuration > [Recruiting] Administration > User-defined Forms

Steps

1. Click Create.
2. Select a file type and click Next.
3. Select a form type and click Create. Or, if you want to use the default fields in the form type, select *Use the default template.*
4. Provide a code, a name, and a description.
5. Add rows, columns and sections using the Toolbox features.
6. In the Field Chooser list, select fields, then drag and drop them in the desired sections.
7. Edit the field properties by selecting a field and scrolling to the *Selected Element Properties* section at the bottom of the form.
8. Click Save.

**Result**
The form appears in the User-defined Forms list and is available when creating user-defined files.

---

**Creating the Create Candidate File**

**Prerequisite**

*Configuration > [Recruiting] Administration > User-defined Files*

**Steps**

1. Click Create.
2. Select Create Candidate in the drop-down list then click Create.
3. Provide a code and a name.
4. Provide a description to facilitate future references.
5. Specify if you want to send the ACE Candidate Alert email.
6. Specify if you want to send the Capture Resume Acknowledgement email.
7. Click Save. The file you just created is displayed.
8. If you want to add information on each of the file tab, click Show next to Tab Management, then click on the tab name.
   The name of a tab in a user-defined file can be modified. You must send the new name to Oracle Support who will then activate the text for your zone. Contact Oracle Support for further information.
   a) Click Edit next to Section Ordering.
   b) Type the name of the section in the Add a Section field.
   The name of the section is viewable by Recruiting Center users when they are in view and edit modes within a file as well as in the file’s Table of Contents.
   c) Click Create Section. The new section appears on the right, under File.
10. Add blocks to the sections.
    a) In the Available Blocks section, select a block.
    b) Drag and drop the block in the section.
11. Click Save.
12. Click Activate.

---

**Selecting the Situation when the Create Candidate File is Used**

**Prerequisite**

*Configuration > [Recruiting] Administration > Candidate File Setup*
Steps

1. Click Edit.
2. Under Create Candidate, for each situation, click Add Staffing Type.
3. In the first drop-down list, select a requisition type.
4. In the second drop-down list, select the situation when the file will be used.
5. Click Save.

Associating the Create Candidate File to a Staffing Type

Prerequisite

Configuration > [Recruiting] Administration > Candidate File Setup

Steps

1. Click Edit.
2. Under Create Candidate, for each situation, click Add Staffing Type.
3. In the first drop-down list, select a requisition type.
4. In the second drop-down list, select the situation when the file will be used.
5. Click Save.

Associating the Create Candidate File to a Configuration Profile

Prerequisite

Configuration > [SmartOrg] Administration > Configuration Profiles

Steps

1. Click a configuration profile.
2. Click the Candidate File Creation setting.
3. Click Edit.
4. Select the desired files.
5. Click Save.

Permission and Field Security Level not Considered when Creating a Candidate

Recruiting Center users have the ability to create candidates without the restriction of security level permissions and field security level.

When creating a candidate general profile or job-specific submission (via the Create Candidate action), the file presented to users will not take into consideration security level permissions in view and edit modes for those users and will allow them to input data into all the fields no matter the security level permissions granted or the security level set for the fields.

<table>
<thead>
<tr>
<th>Security Level Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Security level for internal candidates (in edit mode)</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt;</td>
</tr>
<tr>
<td>• Security level for internal candidates (in view mode)</td>
<td>Recruiting &gt; Candidates</td>
</tr>
<tr>
<td>Security Level Permission</td>
<td>Location</td>
</tr>
<tr>
<td>---------------------------</td>
<td>----------</td>
</tr>
<tr>
<td>• Security level for external candidates (in edit mode)</td>
<td></td>
</tr>
<tr>
<td>• Security level for external candidates (in view mode)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Security Level - Candidate Field</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>• General</td>
<td></td>
</tr>
<tr>
<td>• Restricted</td>
<td></td>
</tr>
<tr>
<td>• Confidential</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Configuration &gt; [Recruiting] Administration &gt; Fields &gt; Candidate</td>
</tr>
</tbody>
</table>

Below is an example of a candidate creation process. In this example, the user does not have security level permissions in edit and view mode for the First Name and Last Name fields:

- The user selects Create Candidate in the More Actions list.
- When doing the duplicate check before creating the candidate, the user has access to the First Name and Last Name fields.
- When creating the candidate, the user also has access to the First Name and Last Name fields.
- Once fields have been filled, the user clicks Save or Save and Close. The system does a check to see if all mandatory fields are filled. If not, the user remains in the create candidate process until he/she fills in all mandatory fields and clicks Save or Save and Close again.
- When all mandatory fields are filled, the user is then moved out of the create candidate process and into the edit or view candidate process. All security level permissions are then considered again. As a result, the user does not see the First Name and Last Name fields in view mode and in edit mode as he/she does not have the security level permissions for that.

Note that when creating a candidate job-specific submission, if the user does not have access (security level permissions) to view or edit the candidate file, the system will automatically redirect the user to the Recruiting Center home page. For example, if the user was creating an internal candidate and he/she is not allowed to see internal candidates, as soon as the user saves the file (that is, exit the create mode), the system will close the file and take the user back to the home page.
User-defined Files

User-defined File

User-defined files are used to build requisitions, requisition templates, and candidate files.

A user-defined file is a page consisting of sections, each section contains blocks, a block contains forms and a form contains fields.

This image illustrates how it appears to Recruiting Center users. In this requisition file, Logistics is the section, Identification is the form, and the form is made up of fields.

Four types of user-defined files can be created:

• Requisition File
• Requisition Template
• Candidate File
• Create Candidate

When creating a user-defined file and starting with a default, any fields that are part of the default which are inactive will still appear in the file and will need to be manually removed during the configuration of the file.

Block

Blocks are inserted in different sections of a user-defined file.

When creating a user-defined file, system administrators can create sections where blocks will be added. These blocks will appear as sub-sections of the file.
In addition to defining the ordering of sections and associated blocks, system administrators can define the properties of the blocks. Each user-defined form that has been created is a type of block that can be inserted into in a file. System administrators have the option to select which form they want to use for a specific block. For example, if a system administrator has created three Candidate Personal Information forms, when adding the Candidate Personal Information block to the file, the system administrator will get to choose which of the three Candidate Personal Information forms will be used for that file.

Some block types have special properties that system administrators can configure.

<table>
<thead>
<tr>
<th>Candidate Blocks</th>
<th>Special Properties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidate Personal Information</td>
<td>Option to force users to provide a valid US social security number.</td>
</tr>
<tr>
<td>Certification</td>
<td>Option to set the minimum number of entries required.</td>
</tr>
<tr>
<td>Education</td>
<td>Option to set the minimum number of entries required.</td>
</tr>
<tr>
<td>References</td>
<td>Option to set the minimum number of entries required.</td>
</tr>
<tr>
<td>Work Experience</td>
<td>Option to set the minimum number of entries required.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Requisition Blocks</th>
<th>Special Properties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information</td>
<td>This block must be one of the first four blocks in the file.</td>
</tr>
</tbody>
</table>

Beside the user-defined forms that are used as blocks of information in a file, pre-defined blocks of information provided with the system are available and can be incorporated in a file. Some of these blocks have special properties. Note that the field level content of these blocks is not configurable, but system administrators do have control over the placement of this information in the file.

<table>
<thead>
<tr>
<th>System-defined Candidate Blocks</th>
<th>Special Properties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account information</td>
<td>None</td>
</tr>
<tr>
<td>Additional Information</td>
<td>None</td>
</tr>
<tr>
<td>Contingent Staffing</td>
<td>None</td>
</tr>
<tr>
<td>Cover Letter</td>
<td>None</td>
</tr>
<tr>
<td>Disqualification Questions</td>
<td>None</td>
</tr>
<tr>
<td>Employment Preferences</td>
<td>Option allowing the display of the Organization menu.</td>
</tr>
<tr>
<td>Job Posting Notification</td>
<td>Option to send by default an email notification whenever a new position matching this profile is posted.</td>
</tr>
<tr>
<td>Prescreening Questionnaire</td>
<td>Option allowing the display of mandatory questions (none, single answer, single and multiple answer, all).</td>
</tr>
<tr>
<td>Prescreening Skills</td>
<td>Option allowing the display of the mandatory statement checkbox. Setting allowing the selection of the skill assessment format (Simple, Detailed or Combined). Setting allowing to save only skill assessments when a candidate provides information about a given skill.</td>
</tr>
<tr>
<td>Profile Questionnaire</td>
<td>Option allowing the display of mandatory questions (none, single answer, single and multiple answer, all).</td>
</tr>
</tbody>
</table>
### System-defined Candidate Blocks

<table>
<thead>
<tr>
<th>Special Properties</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile Skills</td>
<td>Option allowing the display of the mandatory statement checkbox. Setting allowing the selection of the skill assessment format (Simple, Detailed or Combined). Setting allowing to save only skill assessments when a candidate provides information about a given skill.</td>
</tr>
<tr>
<td>Regulations</td>
<td>Option allowing the display of the mandatory statement checkbox. Setting allowing the selection of the skill assessment format (Simple, Detailed or Combined). Setting allowing to save only skill assessments when a candidate provides information about a given skill.</td>
</tr>
<tr>
<td>Resume</td>
<td>Option to define the minimum number of characters required in the resume field.</td>
</tr>
<tr>
<td>Screening</td>
<td>None</td>
</tr>
<tr>
<td>Shift Availability Grid</td>
<td>None</td>
</tr>
<tr>
<td>Source Tracking</td>
<td>None</td>
</tr>
<tr>
<td>Submission Medium</td>
<td>None</td>
</tr>
</tbody>
</table>

### System-defined Requisition Blocks

<table>
<thead>
<tr>
<th>Special Properties</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Abstract</td>
<td>Not in template.</td>
</tr>
<tr>
<td>Candidate Selection Workflow</td>
<td>This block is required in a requisition file and the field is always required to save a requisition. This block is optional for inclusion in the requisition template file, and if included, it will be required to save a template.</td>
</tr>
<tr>
<td>Disqualification Questions</td>
<td>Not in template.</td>
</tr>
<tr>
<td>Group</td>
<td>Not in template. This block must be one of the first four blocks in the file.</td>
</tr>
<tr>
<td>Owners</td>
<td>This block must be one of the first four blocks in the file. In addition, settings allow the display of the following fields: hiring manager, hiring manager assistant, recruiter assistant, collaborators. Note: There is no setting to disable the recruiter field, but this can be accomplished by contextualizing the field so that it only shows up in very limited circumstances. Technically, this field is required to save a requisition to the database as the recruiter is considered the primary owner, but if the field is hidden from view, the user creating the requisition will be assigned the role of recruiter behind the scenes. If the customer has activated Dynamic Approval Routing, the Owners block display the Manager field for users to be able to route a requisition for approval.</td>
</tr>
<tr>
<td>Questions</td>
<td>None</td>
</tr>
<tr>
<td>Regulatory Services</td>
<td>None</td>
</tr>
<tr>
<td>Screening</td>
<td>None</td>
</tr>
<tr>
<td>Skills</td>
<td>Option to select the simple skill assessment format when the skill assessment format is set to Simple or Detailed.</td>
</tr>
<tr>
<td>Structure</td>
<td>This block must be one of the first four blocks in the file. Also, settings allow the display of organization, work location or job role fields.</td>
</tr>
</tbody>
</table>
Duplicating a User-defined File

**Prerequisite**

*Configuration > [Recruiting] Administration > User-defined Files*

**Steps**

1. Click Duplicate next to the file.
2. Provide a code and a name.
3. Provide a description to facilitate future references.
4. Complete any other fields.
5. Click Save.

Editing the Description of a User-defined File

**Prerequisite**

The user-defined file must have the Inactive or Draft status.

The user-defined file must not be in use.

*Configuration > Recruiting] Administration > User-defined Files*

**Steps**

1. Click a user-defined file.
2. Click Edit next to Properties.
3. Modify the description.
4. Click Save.

Activating a User-defined File

**Prerequisite**

The user-defined file must have the Inactive or Draft status.

*Configuration > [Recruiting] Administration > User-defined Files*

**Steps**

1. Click a user-defined file.
2. Click Activate.

**Result**

The user-defined file status is changed to Active. It can now be selected when specifying the situation when the file will be used (via the Candidate File Setup or Requisition File Setup feature).

Deactivating a User-defined File

**Prerequisite**

The user-defined file must have the Active status.

The user-defined file must not be in use.
Steps
1. Click a user-defined file.
2. Click Deactivate.

Result
The user-defined file status is changed to Draft. You can now modify the user-defined file or make it unavailable when building requisition or candidate files.

Deleting a User-defined File

Prerequisite
The user-defined file must have the Inactive or Draft status.

Steps
1. Click Delete next to the file.
2. Confirm the deletion.

Result
The user-defined file no longer appears in the User-defined Files list and can no longer be used.

Adding a Section in a User-defined File

Prerequisite
The user-defined file must have the Inactive or Draft status.

Steps
1. Click a user-defined file.
2. Click Edit next to Section Ordering.
3. Type the name of the section in the Add a Section field.
   The name of the section is viewable by Recruiting Center users when they are in view and edit modes within a file as well as in the file’s Table of Contents.
4. Click Create Section.

Result
A new section appears on the right, under File.

Next Step
Adding blocks to the user-defined file.

Deleting a Section in a User-defined File

Prerequisite
The user-defined file must have the Inactive or Draft status.
Steps
1. Click a user-defined file.
2. Click Edit next to Section Ordering.
3. Click Delete next to a section.
4. Click Save.

Result
The section and its blocks are no longer displayed in the file.

Adding a Block in a User-defined File
Prerequisite
The user-defined file must have the Inactive or Draft status.
At least one section must be created in the user-defined file.

Steps
1. Click a user-defined file.
2. Click Edit next to Section Ordering.
3. In the Available Blocks section, select a block.
4. Drag and drop the block in the section.
5. Click Save.

Removing a Block from a User-defined File
Prerequisite
The user-defined file must have the Inactive or Draft status.
The block must not be mandatory.

Steps
1. Click a user-defined file.
2. Click Edit next to Section Ordering.
3. Select a block included in a section located on the right hand side.
4. Drag and drop the block to the Available Blocks list.
5. Click Save.

Modifying the Title of a Section
Prerequisite
The user-defined file must have the Inactive or Draft status.
Steps
1. Click a user-defined file.
2. Under Sections Ordering, click on a section.
3. Click Edit next to Properties.
4. Modify the value in the Title field.
   The Title field supports 75 text based characters.
5. Click Save.

Result
The title of a section is viewable by Recruiting Center users when they are in view and edit modes within a file as well as in the file’s Table of Contents.

Modifying the Title of a Block

Prerequisite
The user-defined file must have the Inactive or Draft status.
The Title field supports 75 text based characters.

Steps
1. Click a user-defined file.
2. Under Sections Ordering, click on a block.
3. Click Edit next to Properties.
4. Modify the value in the Title field.
   The Title field supports 75 text based characters.
5. Click Save.

Result
The title of a block is viewable by Recruiting Center users when they are in view and edit modes within a file as well as in the file’s Table of Contents.

Modifying the Name of a Tab in a User-defined File

The name of a tab in a user-defined file can be modified. The system administrator can send the new name to Oracle Support who will then activate the text for your zone. Contact Oracle Support for further information.

Adding Custom Instructions to a Block

Prerequisite

Steps
1. Click a user-defined file.
2. Click on a block.
3. Click Edit next to Properties.
4. In the Description field, enter custom instructions.
   The Description field supports 4000 text based characters.
5. Format instructions if desired.
6. Click Save.

**Result**
The specific instructions appear underneath the block title of a file to assist Recruiting Center users in understanding what they need to do in a specific block of a file.

### Adding Custom Instructions to a Section

**Prerequisite**

*Configuration > [Recruiting] Administration > User-Defined Files*

**Steps**

1. Click a user-defined file.
2. In the Section Ordering section, click on a section title (displayed in bold).
3. Click Edit next to Properties.
4. In the Description field, enter custom instructions.
   The Description field supports 4000 text based characters.
5. Format instructions if desired.
6. Click Save.

**Result**
Instructions are only viewable by Recruiting Center users when they are in edit mode within a file. The instructions appear underneath the section title to assist users in understanding what they need to do in a specific section of a file.

### Adding Custom Instructions to a Tab

**Prerequisite**

*Configuration > [Recruiting] Administration > User-Defined Files*

**Steps**

1. Click a user-defined file.
2. In the Tab Label Management section, click Show.
3. Click on a tab.
4. Click Edit next to Properties.
5. In the Description field, enter custom instructions.
   The Description field supports 4000 text based characters.
6. Format instructions if desired.
7. Click Save.
Result

Instructions are only viewable by Recruiting Center users when they are in edit mode within a file. The instructions appear underneath the tab header to assist users in understanding what they need to do in the History, Referral and Attachments tabs of a file.

Choosing a User-defined Form for a Block

Prerequisite

Not available for all block types.

The user-defined file must have the Inactive or Draft status.

Configuration > [Recruiting] Administration > User-defined Files

Steps

1. Click a user-defined file.
2. Under Section Ordering, click on a block.
3. Click Edit next to Properties.
4. Select a form in the User-defined Form drop-down list.
5. Click Save.
User-defined Forms

User-defined Form

A user-defined form is a block of information containing standard and/or custom fields and that is added to a user-defined file.

User-defined forms can be created for these file types:

• requisition files
• requisition templates
• candidate files

Several types of forms are available for each file type. These types of forms are suggested ways of packaging information and each form contains a default template that system administrators can use to start building the form. System administrators can also choose to build the form from scratch and ignore the default template. Note that it is possible to create multiple user-defined forms for each type of form. For example, three different user-defined forms for references could be created and used for different purposes.

The table presents the types of user-defined forms available for requisition files, requisition templates and candidate files.

<table>
<thead>
<tr>
<th>Requisition Files</th>
<th>Requisition Templates</th>
<th>Candidate Files</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abstract</td>
<td>Additional Information</td>
<td>Background Check</td>
</tr>
<tr>
<td>Additional Information</td>
<td>Budget</td>
<td>Basic Profile</td>
</tr>
<tr>
<td>Budget</td>
<td>Compensation</td>
<td>Candidate Personal Information</td>
</tr>
<tr>
<td>Compensation</td>
<td>Contingent Terms</td>
<td>Certifications</td>
</tr>
<tr>
<td>Contingent Terms</td>
<td>External Description</td>
<td>Education</td>
</tr>
<tr>
<td>External Description</td>
<td>Identification</td>
<td>References</td>
</tr>
<tr>
<td>Identification</td>
<td>Internal Description</td>
<td>Work Conditions</td>
</tr>
<tr>
<td>Internal Description</td>
<td>Other</td>
<td>Work Experience</td>
</tr>
<tr>
<td>Other</td>
<td>Profile</td>
<td>eSignature</td>
</tr>
<tr>
<td>Profile</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Duplicating a User-defined Form

Prerequisite

Configuration > [Recruiting] Administration > User-defined Forms

Steps

Click Duplicate next to the form.
Result
The new user-defined form has the same code with the extension (copy).

Previewing a User-defined Form

Prerequisite
Configuration > [Recruiting] Administration > User-defined Forms

Steps
Click Preview next to the user-defined form.

Deleting a User-defined Form

Prerequisite
The user-defined file must have the Inactive status.

Configuration > [Recruiting] Administration > User-defined Forms

Steps
1. Click Delete next to the user-defined form.
2. Confirm the deletion.

Result
The user-defined form no longer appears in the User-defined Forms list. The user-defined form can no longer be used in user-defined files.

Activating a User-defined Form

Prerequisite
Configuration > [Recruiting] Administration > User-defined Forms

Steps
Click Activate next to the user-defined form.

Result
The user-defined form status is changed to Active. The user-defined form can be used when creating user-defined files.

Deactivating a User-defined Form

Prerequisite
The user-defined form status must be Active.
The user-defined form must not be in use.

Configuration > [Recruiting] Administration > User-defined Forms

Steps
Click Deactivate next to the user-defined form.
Result
The user-defined form status is changed to Draft. The user-defined form is unavailable when creating user-defined files.

Adding Fields to a User-defined Form

**Prerequisite**

*Configuration > [Recruiting] Administration > User-defined Forms*

**Steps**

1. Click a form.
2. Select a field from the Field Chooser list.
3. Drag and drop the field in the desired section.
4. Edit the properties of a field by selecting the field and scrolling to the *Selected Element Properties* section at the bottom of the form.
5. Click Save.

Editing the Properties of a User-defined Form

**Prerequisite**

*Configuration > [Recruiting] Administration > User-defined Forms*

**Steps**

1. Click a user-defined form.
2. Modify the Name, Code and Description fields.
3. Click Save.

Editing the Properties of Fields in a User-defined Form

**Prerequisite**

*Configuration > [Recruiting] Administration > User-defined Forms*

**Steps**

1. Click a user-defined form.
2. In the Page Content section, click in a field.
3. In the *Selected Element Properties* section, located at the bottom of the form, modify the properties of the field.
4. Click Save.

Adding a Static Hyperlink in a User-defined Form

**Prerequisite**

*Configuration > [Recruiting] Administration > User-defined Forms*

**Steps**

1. Click a user-defined form.
2. Click a field.
3. In the Selected Element Properties section, under Field Type, select URL.
4. In the Selected Element Properties section, under Access Type, select Read-only.

Access must be set to read-only to ensure the user cannot change the value of the URL.

### Adding Custom Instructions to a Field

**Prerequisite**

*Configuration > [Recruiting] Administration > User-Defined Forms*

**Steps**

1. Click a user-defined form.
2. In the Page Content section, click in a field.
3. In the Selected Element Properties section at the bottom of the page, enter custom instructions in the Instructions field.
   
   The Instructions field supports 1000 characters, embedded HTML and hyperlinks.
   
   Note that the Help Callout field is not used in Recruiting.
4. Format instructions if desired.
5. Click Save.

**Result**

Instructions are only viewable by Recruiting Center users when they are in edit mode within a file. The instructions appear underneath the field to assist users in understanding what they need to do with certain fields contained in a file.

### User-defined Forms Selected Element Properties

Available properties depend on the type of field. Not all properties are available for all elements or for all products.

<table>
<thead>
<tr>
<th>Property Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access (Editable/ Read Only)</td>
<td>Indicates if the field is read-only or editable. When read-only is selected, a user is unable to modify the field. Default value is Editable.</td>
</tr>
<tr>
<td>Binding field</td>
<td>Data source to which the element is bound. The value displayed in the Binding field represents the data value (available in the first list of the Field Chooser) to which the element is associated. For example, the Annual Bonus field is bound to the AssignmentOfferForForm/AnnualBonus. The value in the Binding field is not editable.</td>
</tr>
<tr>
<td>Columns</td>
<td>Number of columns. Administrator can determine how many columns of fields to display in each area of each page of the forms.</td>
</tr>
<tr>
<td>CSS Style</td>
<td>The desired visual style for displaying the value within an input field. Use styles as defined in the Cascading Style Sheets 2.0 standard: <a href="http://www3.org">ww3.org</a> reference. This style will override the main style that is used when the form is displayed to assignees and viewers. If no style information is entered, the default visual presentation will be used for that page.</td>
</tr>
<tr>
<td>CSS Style Label</td>
<td>This is used to control the formatting of the label above the input field that is displayed to the assignee and form viewer.</td>
</tr>
<tr>
<td>Property Option</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>CSS Style Instructions</td>
<td>This style will override the style defined in the career section theme. If no information is entered, the style defined in the career section theme will be used.</td>
</tr>
<tr>
<td>Default Value</td>
<td>Default value of the input field</td>
</tr>
<tr>
<td>Field Label</td>
<td>Input Field Label</td>
</tr>
<tr>
<td>Field Size</td>
<td>Indicates the number of elements displayed in a list. Field Size is used for multiple-selection fields. Default value is 1. For example, if the field size is 2, the list will display 2 values.</td>
</tr>
<tr>
<td>Field Type</td>
<td>• Text Input&lt;br&gt;• Password Input&lt;br&gt;• Suggest&lt;br&gt;• Text Area&lt;br&gt;• Rich Text Format&lt;br&gt;• Check Box&lt;br&gt;• Radio Button&lt;br&gt;• Drop-down List&lt;br&gt;• Check Box&lt;br&gt;• Multi level Selector - this enables the user to select a collection of cascading values that are dependent on each other. Such as selecting a country, followed by a state/province and then a city.&lt;br&gt;• Date input&lt;br&gt;• Date Drop-down list&lt;br&gt;• Selector&lt;br&gt;• Read-only Text&lt;br&gt;• URL - this enables the value of the field to be displayed as a clickable link when the user accesses the form.&lt;br&gt;• Image URL - works the same as the URL, but makes the corresponding image a clickable link.</td>
</tr>
<tr>
<td>Help Callout</td>
<td>Similar to instructions, but this is displayed as a help bubble on the form and can provide information about a field to the user.</td>
</tr>
<tr>
<td>Input Mask</td>
<td>Format of the input value. The following syntax must be used: 9 = any number, a = any letter, n = any letter or number,</td>
</tr>
<tr>
<td>Instructions</td>
<td>This can be used to provide any special instructions necessary to explain what is being requested for the field. The instructions will appear just below the field.</td>
</tr>
<tr>
<td>Mandatory</td>
<td>Indicates, by selecting the Yes or No option, if the field must be completed. When a field is mandatory, a red square appears in front of the field. This can be useful for preventing an assignee from submitting a form with the value 'Not Specified' in a user-defined selection. Marking the field as Mandatory will require the assignee to specify a value.</td>
</tr>
<tr>
<td>Rows</td>
<td>Number of rows available in a text area.</td>
</tr>
<tr>
<td>Property Option</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Save Literals</td>
<td>If Input Mask is used for a field, it may require that specific numbers or letters appear within the field when the assignee fills it out at runtime. Save Literals determines if specific characters in the input mask will be saved in this field, or if they are simply required for the user to type in but removed from the saved value. This is useful for helping assignees to recognize the right information to type in, while removing the redundant characters for later use.</td>
</tr>
</tbody>
</table>
| Status (Deactivated/Activated) | Indicates if the field is activated or deactivated (that is, grayed out or not). The use of this field depends on the value selected in the Access field.  
Editable access + Activated status = field can be modified  
Read-only access + Activated status = field not editable  
Read-only access + Deactivated status = field not editable  
Editable access + Deactivated status = field not editable |
| Tooltip                 | Displays the text entered in the input field as a tooltip when the assignee/viewer hovers over the field in the form.                           |
| Value                   | Area where user input should be entered or where the information saved in a field is displayed.                                              |
Candidate File and Requisition File Setup

Candidate File Setup and Requisition File Setup

The Candidate File Setup and Requisition File Setup features allow system administrators to indicate in which situations user-define files will be used and to associate user-defined files to staffing types.

System administrators first define a primary file. Then, if desired, they can set a different file to be used for each staffing type. If a staffing type is not specified, the default file will be used.

<table>
<thead>
<tr>
<th>Candidate File Setup</th>
<th>Purpose</th>
</tr>
</thead>
</table>
| Candidate File       | Activated candidate file for viewing and editing general profiles.  
                        | The same file is used for both editing and viewing purposes. |
|                      | Activated candidate file for viewing and editing job submissions.  
                        | The same file is used for both editing and viewing purposes. |
| Create Candidate     | Activated file for the quick creation of candidate profiles (default file).  
                        | First activated file for creating candidate profiles. |
|                      | Second activated file for creating candidate profiles.  
                        | Third activated file for creating candidate profiles. |
|                      | Fourth activated file for creating candidate profiles.  
                        | First activated file for creating job-specific submissions. |
|                      | Second activated file for creating job-specific submissions.  
                        | Third activated file for creating job-specific submissions. |
|                      | Fourth activated file for creating job-specific submissions.  
                        | Activated file for creating referrer and candidate profiles. |
|                      | Activated file for capturing referrer profiles and job-specific submissions. |

At least one Create Candidate flow must be activated for the Create Candidate feature to work.

<table>
<thead>
<tr>
<th>Requisition File Setup</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisition File</td>
<td>Requisition File 1.</td>
</tr>
<tr>
<td></td>
<td>Requisition File 2.</td>
</tr>
<tr>
<td></td>
<td>Requisition File 3.</td>
</tr>
<tr>
<td>Requisition File Setup</td>
<td>Purpose</td>
</tr>
<tr>
<td>------------------------</td>
<td>---------</td>
</tr>
<tr>
<td>Requisition Template</td>
<td>Activated file for creating requisition templates.</td>
</tr>
</tbody>
</table>

**Dissociating a Requisition File from a Staffing Type**

**Prerequisite**

*Configuration > [Recruiting] Administration > Requisition File Setup*

**Steps**

1. Click Edit.
2. Click Remove next to a staffing type.
3. Click Save.

**Result**

If no other staffing types are associated to the requisition file, the requisition file will be used with all types of staffing.

**Disassociating a Candidate File from a Staffing Type**

**Prerequisite**

*Configuration > [Recruiting] Administration > Candidate File Setup*

**Steps**

1. Click Edit.
2. Click Remove next to a staffing type.
3. Click Save.

**Result**

If no other staffing types are associated to the candidate file, the candidate file will be used with all types of staffing.
Candidate Selection Workflows

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Candidate Selection Workflow

Candidate Selection Workflow

A candidate selection workflow (CSW) provides the framework to move a candidate through the hiring process in order to evaluate and find the best candidate for a job.

A CSW includes steps, statuses, and actions a recruiter must go through before hiring a candidate. An analogy can be drawn between the candidate selection workflow and moving candidate resumes from one pile to another as the selection progresses and the number of resumes retained is reduced. For example, a candidate submission is analyzed, the candidate is contacted, interviewed, then selected.

The CSW is created by system administrators then selected by Recruiting Center users when creating a requisition. When candidates apply on the requisition, the selected CSW is used to track and manage candidates from the time they are new to the system to the time that they are hired. Candidate files in each step of the CSW can have a status. Specific actions can be performed on these candidate files depending on the steps and statuses. A set of user type permissions grant users access to the actions that can be performed in a candidate selection workflow.

The CSW can be displayed to users on a priority basis. The system will sort workflows according to the level of compatibility and ensure that the most appropriate workflow is displayed when users create a requisition.

Step

Candidate selection workflows are comprised of steps that represent the levels that candidates reach as they progress through the hiring process. A step represents a major stage or event in a candidate selection workflow.

A step in a candidate selection workflow can be mandatory or optional.

- If a step is mandatory, the user must take the candidate through the step before moving on to any subsequent steps. The user will not have access to the subsequent list of steps until the step is completed.
- If a step is optional, the user can skip the step entirely and move the candidate on to the next step. Or, the user can move a candidate conditionally through a step without completing the step in order to move to a subsequent step, and return to the conditional completion step later to complete it.

Most steps are mandatory and sequential, meaning that they must be completed in the prescribed order. In some scenarios, a user may be able to move a candidate to a step without completing the current one, but the system will require that all mandatory steps be completed before a hire can be completed.

Each step must be finished with a completion status, indicated by an asterisk (*), before a candidate can move to another step in the hiring process. A completion status completes the step.

A step can have a Restricted confidentiality level. In many organizations, hiring managers are not involved in the earliest steps of the candidate selection process. Recruiters are responsible for evaluating new applications and only submit qualified candidates to the hiring managers. It is possible to configure steps to prevent hiring managers from viewing specific selection steps (such as New) in the Recruiting Center Candidates list.

Notifications can be added to steps. This allows sending a message to users to let them know when a step is reached by candidates.

There is no limit on the number of steps that can be used in a CSW. However, a best practice is to only add necessary steps.
Status

A status indicates the detail or state of where a candidate is within a step.

A candidate can change status during a step but the candidate can only have one status at a time in each step. Statuses are more flexible than steps as most are optional and do not need to be followed in a certain order. Statuses can be temporary therefore requiring an additional action from the user or they can complete a step (indicated by *) because they complete the step by either moving the candidate to the next step or terminating the candidate selection process.

Statuses may have different progression levels:

<table>
<thead>
<tr>
<th>Progression Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Started</td>
<td>Indicates that the step has not started yet. Example: For the 1st Interview step, “To be Scheduled” is a Not Started status because the interview has not been scheduled and the step has not officially started.</td>
</tr>
<tr>
<td>In Progress</td>
<td>Indicates that a candidate needs to be moved to other statuses before moving to the next step. The option “move” is not available to the user at this point. Example: For the 1st Interview step, “Scheduled” is an In Progress status.</td>
</tr>
<tr>
<td>Completed</td>
<td>Indicates that a candidate can move to the next step. The “move” option is available to the user at this point. When selecting the Completed level, the following option becomes available: “Allow completion even if some activities remain pending”. This option allows the move to the next step even if some activities are still pending from a previous step.</td>
</tr>
</tbody>
</table>

Status change buttons (or shortcut buttons) allow recruiters to change the status of a candidate without having to open the Action window. A status can be linked to one of these buttons. Only one status can be assigned to a specific button in the current step.

<table>
<thead>
<tr>
<th>Button</th>
<th>Behavior in the Candidate File</th>
<th>Behavior in the Candidate List</th>
</tr>
</thead>
<tbody>
<tr>
<td>![✔️]</td>
<td>Changes the status of the candidate to a completion status.</td>
<td>Changes the status of all selected candidates to a completion status.</td>
</tr>
<tr>
<td>![❌]</td>
<td>Changes the status of the candidate to Rejected.</td>
<td>Changes the status of all selected candidates to Rejected.</td>
</tr>
<tr>
<td>![❓]</td>
<td>Changes the status of the candidate to Under consideration.</td>
<td>Changes the status of all selected candidates to Under consideration..</td>
</tr>
</tbody>
</table>

Action

An action is an event performed on a candidate file during the hiring process.

A candidate selection workflow action is linked to a specific step of the candidate selection workflow by the system administrator and it is performed by a user when a candidate reaches the step of the workflow. For example, if the action Start Onboarding Process is added to a step, then the recruiter can start the Onboarding process when a candidate is in that step.
Candidate selection workflow actions are provided by the system. They cannot be created. Available actions for a candidate selection are:

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Comments</td>
<td>Add comments to a candidate file.</td>
</tr>
<tr>
<td>Bypass</td>
<td>Bypass a step in a candidate selection workflow without any restriction.</td>
</tr>
<tr>
<td>Change Status</td>
<td>Change the status of a step in a candidate selection workflow.</td>
</tr>
<tr>
<td>Grade</td>
<td>Enter or remove a grade in a candidate file.</td>
</tr>
<tr>
<td>Move</td>
<td>Move a candidate from one step to another.</td>
</tr>
<tr>
<td>Reset Selection Process</td>
<td>The rules for the &quot;Reset Selection Process&quot; action are not well implemented and for now it is best to not implement this action. This manual candidate feature is activated via the permission &quot;Reset the selection process of an existing submission&quot;.</td>
</tr>
<tr>
<td>Revert</td>
<td>Undo the last action in a step.</td>
</tr>
<tr>
<td>Self-Assigned Task</td>
<td>When a candidate gets to the step where the Self-assigned Task action was added, Recruiting Center users have the ability to select the Create a self-assigned task option in the Change Step and Status window or Bypass window. If the option is selected, users have to provide a name, due date, description, and comments for the self-assigned task. The task then becomes available under the Tasks tab.</td>
</tr>
<tr>
<td>Send Correspondence</td>
<td>Send a correspondence to a candidate.</td>
</tr>
<tr>
<td>Share Candidate in CSW Assistant</td>
<td>Share a candidate while the candidate is moving in the selection workflow.</td>
</tr>
<tr>
<td>Start New Hire Transition Process</td>
<td>Start a new hire process.</td>
</tr>
<tr>
<td>Start Onboarding Process</td>
<td>Start an onboarding process.</td>
</tr>
<tr>
<td>Start Pre Hire Transition Process</td>
<td>Start a prehire process.</td>
</tr>
<tr>
<td>Undelete</td>
<td>Undelete a candidate file.</td>
</tr>
<tr>
<td>Update Start Date</td>
<td>Update the start date of a candidate.</td>
</tr>
</tbody>
</table>

**Qualifier**

A qualifier is a reason linked to a status for rejecting a candidate or for explaining why a candidate declined a job offer.

Qualifiers are created by the system administrator and linked to the Has declined and Rejected statuses. Qualifiers provide additional information needed to move a candidate in a candidate selection workflow or to change the status of a candidate.

When users change the status of a candidate to Has declined or Rejected, the qualifiers displayed will vary depending on the statuses linked to the steps chosen for the selected candidate selection workflow.

For example, a candidate may have declined a job for personal reasons, because he/she does not want to relocate, or because he/she has accepted another position. In this case the qualifiers could be:

- Not willing to relocate
- Not willing to travel
- Feels that salary is insufficient
- No reason given
- etc.

Qualifiers are grouped together into qualifier groups.

### Candidate Selection Workflow Example

The example illustrates a candidate selection workflow with six steps and several statuses for each of the steps.

- ![Finish](image) is the shortcut button to change to a completion status.
- ![Reject](image) is the shortcut button to change to the rejected status.

<table>
<thead>
<tr>
<th>Step 1: New</th>
<th>Step 2: HM Review</th>
<th>Step 3: Interview / Assessment</th>
<th>Step 4: Offer</th>
<th>Step 5: Background Check</th>
<th>Step 6: Hire</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Applicant</td>
<td>To be HM Reviewed</td>
<td>To Be Interviewed</td>
<td>Offer to be Made</td>
<td>Initiate Background Screening</td>
<td>Proceed to Hire</td>
</tr>
<tr>
<td>Under Consideration</td>
<td>To be Rejected Post HM Reviewed</td>
<td>Invite to Scheduling Center</td>
<td>Draft</td>
<td>Background Follow-Up in Progress</td>
<td>Candidate No-Show (Rescind or Renego Offer)</td>
</tr>
<tr>
<td>Recommended <img src="image" alt="Finish" /></td>
<td>HM Approved <img src="image" alt="Finish" /></td>
<td>Phone Screen</td>
<td>Approval in Progress</td>
<td>Background Screening Completed</td>
<td>Hired <img src="image" alt="Finish" /></td>
</tr>
<tr>
<td>Rejected <img src="image" alt="Reject" /></td>
<td>Rejected <img src="image" alt="Reject" /></td>
<td>1st Interview</td>
<td>Approved</td>
<td>Rejected <img src="image" alt="Reject" /></td>
<td>Rejected <img src="image" alt="Reject" /></td>
</tr>
<tr>
<td>Has Declined</td>
<td>Has Declined</td>
<td>2nd Interview</td>
<td>Extended</td>
<td>Has Declined</td>
<td>Has Declined</td>
</tr>
<tr>
<td></td>
<td>3rd Interview</td>
<td>Rescinded</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Interviews Completed <img src="image" alt="Finish" /></td>
<td>In Negotiation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Rejected <img src="image" alt="Reject" /></td>
<td>Refused</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Has Declined</td>
<td>Accepted <img src="image" alt="Finish" /></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Reneged</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Rejected <img src="image" alt="Reject" /></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Has Declined</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Reference Model

Steps and statuses must be mapped to a core standard process for reporting and database administration.

The reference model is made up of the following steps:

- New
- Reviewed
- First Interview
- Second Interview
- Third Interview
- Testing
- Offer
- Hired
- Rejected
- Declined
- Pipeline
- Inactive

Default Candidate Selection Workflows

Default candidate selection workflows (CSWs) are supplied with the system. They can be used as templates to create customized workflows.

<table>
<thead>
<tr>
<th>Default CSW</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard</td>
<td>A streamlined version of the Master workflow similar to the original sequential workflow.</td>
</tr>
<tr>
<td>Internal</td>
<td>A workflow designed to accommodate an internal recruitment selection process.</td>
</tr>
<tr>
<td>Executive</td>
<td>A workflow designed to accommodate an executive recruitment selection process.</td>
</tr>
<tr>
<td>Executive (Agency)</td>
<td>A workflow designed to accommodate an agency driven executive recruitment selection process.</td>
</tr>
<tr>
<td>Temporary/Contract</td>
<td>A workflow designed to accommodate a temporary or contract recruitment selection process.</td>
</tr>
<tr>
<td>Campus/Student</td>
<td>A workflow designed to accommodate a campus recruitment selection process.</td>
</tr>
<tr>
<td>Master</td>
<td>A workflow that can be customized when no other workflow meets your requirements.</td>
</tr>
<tr>
<td>Staffing Station</td>
<td>A workflow for applications received via Staffing Stations.</td>
</tr>
<tr>
<td>Union</td>
<td>A workflow for unionized candidates.</td>
</tr>
</tbody>
</table>
Candidate Selection Workflow Configuration

Building a Candidate Selection Workflow

Building a candidate selection workflow consists of the following steps.
1. Duplicating an existing candidate selection workflow to fit your organization needs.
2. Reviewing the steps and statuses included in the new candidate selection workflow.
3. Reviewing the actions tied to the steps of the candidate selection workflow.
4. Associating an OLF to the candidate selection workflow.
5. Associating a requisition type to the candidate selection workflow.
6. Activating the candidate selection workflow.

Duplicating a Candidate Selection Workflow

Prerequisite
Configuration > [Recruiting] Administration > Candidate Selection Workflow

Steps
1. Click the Workflows tab.
2. Click on a candidate selection workflow.
3. Click Duplicate.
4. Enter a name for the new candidate selection workflow and translate it in all available languages.
5. Enter a code, comments, and description.
6. Select Default if you this workflow to be the default one when users create a requisition.
7. Review the current steps in the workflow.
   a) Remove the steps that are not necessary. Select the checkbox next to a step, then click Remove.
   b) Add new steps if necessary. Click Add..., select the desired step, then click Add.
   c) Reorder steps if necessary. Select a position (number) in the list for each step, then click Reorder.
   d) Review the properties of each step.
      "Mandatory" indicates that the step is required to be completed.
      "Restricted" prevents a step from being visible in the Recruiting Center candidate list for those who
do not have the permission to see restricted steps. If you make a step Restricted, you must also set the
permission "View candidates in steps whose confidentiality level is "Restricted".
      "Allow” allows users to move candidates from one step to another and to complete unfinished tasks at
a later time on the selection process.
   e) Set notifications so that users receive a message when a step is reached by a candidate. Select a
recipient, then select a message template.
   f) Click Done.
8. Click Done.

Reviewing the Steps and Statuses Included in a Candidate Selection Workflow

Prerequisite
Configuration > [Recruiting] Administration > Candidate Selection Workflow
Steps

1. Click the Steps tab.
2. Click on a step that is included in the candidate selection workflow.
3. Review the statuses comprised in the step.
   a) Remove the statuses that are not necessary. Select the checkbox next to a status, then click Remove.
   b) Add new statuses if necessary. Click Add..., select the desired status, then click Add.
   c) Reorder statuses if necessary. Select a position (number) in the list for each status, then click Reorder.
4. Review the properties of each status.
   a) Indicate if the status is the initial status of the step.
   b) Determine the step progression level, that is Not Started, In Progress, Completed.
   c) Select a status change button that is used as a shortcut to change the status of a candidate directly in a candidate file.
   d) Select the Ask for a qualifier option if you want the user to select a qualifier to motivate the change to this status. This option is available only if the status has qualifiers defined.
   e) Select the Ask for comments option if you want the user to enter a comment when the change is done to this status.
   f) Select the Interview Scheduling Behavior option if you want the system to automatically change the status once an interview is scheduled for the step. This option is used with the Interview Scheduling feature only. You can activate the Interview Scheduling Behavior option for statuses related to the 1st, 2nd and 3rd Interview steps. When a recruiter creates a meeting in Taleo Recruiting, if the Interview Scheduling Behavior option is selected in more than one status, the recruiter will have to select the appropriate status in the Action Dialog window. The Interview Scheduling permission must be enabled.
   g) Set notifications so that users receive a message when a status is reached by a candidate. Select a recipient, then select a message template.
   h) Activate the automatic progression of candidates feature if desired and create conditions.
   i) Click Done.
5. Make the step available by clicking the Available option.
6. Repeat the above steps for each step comprised in the candidate selection workflow.

Reviewing the Actions Tied to the Steps of the Candidate Selection Workflow

Prerequisite

Configuration > [Recruiting] Administration > Candidate Selection Workflow

Steps

1. Click the Steps tab.
2. Click on a step that is included in the candidate selection workflow.
3. Click the Actions Usage tab.
4. Review the actions tied to the step.
   a) Remove the actions that are not necessary. Select the checkbox next to an action, then click Remove.
   b) Add new actions if necessary. Click Add..., select the desired action, then click Add.
   c) Reorder actions if necessary. Select a position (number) in the list for each action, then click Reorder.
5. Click Done.
Associating Organizations, Locations, Job Fields to a Candidate Selection Workflow

**Prerequisite**
The candidate selection workflow must be created.

*Configuration > [Recruiting] Administration > Candidate Selection Workflow*

**Steps**
1. Click the Workflows tab.
2. Click a candidate selection workflow.
3. Click the Display Context tab.
4. Click Add in the Jobs, Organizations and/or Locations sections.
5. Select Organization-Location-Job Field elements.
6. Click Done.

**Result**
The candidate selection workflow is associated to an Organization-Location-Job Field (OLF) structure. When users create a requisition, only the workflows matching the OLF structure of the requisition will be displayed. When associating an OLF structure to a candidate selection workflow, the more specific the level of the structure is, the more compatible the workflow will be with a requisition. Moreover, the system will automatically select the workflow which provides the highest degree of compatibility with the requisition.

Associating a Requisition Type to a Candidate Selection Workflow

**Prerequisite**
The candidate selection workflow must be created.

*Configuration > [Recruiting] Administration > Candidate Selection Workflow*

**Steps**
1. Click the Workflows tab.
2. Click a candidate selection workflow.
3. Click the Display Context tab.
4. Select a requisition type in the Available Requisition Types list.
5. Click Add
6. Click Done.

**Result**
When users create a requisition, workflows are displayed according to the requisition type (professional, hourly, contingent, etc.) selected for the requisition (instead of all workflows of the company).

Activating a Candidate Selection Workflow

**Prerequisite**
The candidate selection workflow must be created.

*Configuration > [Recruiting] Administration > Candidate Selection Workflow*
Steps
1. Click the Workflows tab.
2. Click on a candidate selection workflow.
4. Click Done.

Result
In the Workflows page, a check mark appears in the Available column next to the candidate selection workflow. The candidate selection workflow is now available to users when creating a requisition.

Candidate Selection Workflow - Permissions and Settings
The following permissions and settings are used for the candidate selection workflow functionality.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permissions related to candidate selection workflows are grouped under Candidate Selection Workflow.</td>
<td></td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Candidates &gt; Candidate Selection Workflow</td>
</tr>
<tr>
<td>Choose a candidate selection workflow</td>
<td></td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions &gt; General</td>
</tr>
<tr>
<td>Set candidate selection workflow event dates</td>
<td>This permission must be granted if you selected the option &quot;Allow event date entry and modification&quot; while configuring a status.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Candidates &gt; Candidate Selection Workflow</td>
</tr>
<tr>
<td>Allow users to view candidates that are being considered in other active requisitions</td>
<td>The permission works in conjunction with the setting &quot;Threshold CSW Step - Hide from Search&quot;. See setting description below for details.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Search</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reset Candidate Selection Workflow after Candidate Re-applies</td>
<td>Reset the candidate selection workflow to the 1st step/status after a candidate re-applies for the same requisition (after submission expiration). By default the candidate's status remains the same. The CSW will not change if the submission has reached the &quot;Offer&quot; step or if an interview has been scheduled.</td>
<td>If the submission has reached the status Hired, Inactive or Withdrawn</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Simultaneous Hiring of Multiple Candidates</td>
<td>Allow users to hire multiple candidates simultaneously.</td>
<td>Yes</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Setting</td>
<td>Description</td>
<td>Default Value</td>
<td>Location</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------</td>
<td>------------------------------------------------------------</td>
</tr>
<tr>
<td>The setting is a global setting</td>
<td>The setting is a global setting that affects all requisition types (professional, executive, hourly, etc.). It cannot be activated for a specific requisition type. As a recommended practice, customers should activate this feature to perform mass hiring.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Threshold CSW Step - Hide from Search</td>
<td>Indicates the CSW reference model step at which, once reached, candidates will be excluded from search results (unless the user type has overriding permission). Candidates are excluded from search results once they have reached the threshold step or when they are at a step that comes after the threshold step in the reference model sequence. Possible values are:</td>
<td>Minimum Workflow Sequence</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td></td>
<td>• Not Specified (candidates are never excluded from search result)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• New</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Reviewed</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Declined</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Rejected</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Testing</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Offer</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Minimum Workflow Sequence</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• 1st Interview</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• 2nd Interview</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• 3rd Interview</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Candidate Selection Workflow - Other Configuration Tasks

Creating a Candidate Selection Workflow

**Prerequisite**

*Configuration > [Recruiting] Administration > Candidate Selection Workflow*

**Steps**

1. Click the Workflows tab.
2. Click New...
3. Enter a name for the new candidate selection workflow and translate it in all available languages.
4. Enter a code, comments, and description.
5. Click the Steps Usage tab.
6. Add steps to the workflow.
   a) Click Add...
   b) Select steps.
   c) Click Add.
7. Reorder steps.
   a) Select a position (number) in the list for each step.
   b) Click Reorder.
8. **Associate Organizations, Locations and Job Fields to the workflow.**
9. **Associate a requisition type to the workflow.**
10. Click Done.

**Result**

The candidate selection workflow appears in the Workflows page.

Deleting a Candidate Selection Workflow

**Prerequisite**

A workflow being used by another user cannot be deleted.

*Configuration > [Recruiting] Administration > Candidate Selection Workflow*

**Steps**

1. Click the Workflows tab.
2. Select a candidate selection workflow.
3. Click .

**Result**

The candidate selection workflow can no longer be used in the Recruiting Center. The candidate selection workflow is permanently removed from the database.
Deactivating a Candidate Selection Workflow

**Prerequisite**
A candidate selection workflow must be active in order to deactivate it.

**Configuration > [Recruiting] Administration > Candidate Selection Workflow**

**Steps**
1. Click the Workflows tab.
2. Click a candidate selection workflow.
3. Clear the Available check box.
4. Click Done.

**Result**
In the Workflows page, a check mark no longer appears in the Available column next to the candidate selection workflow. Users can no longer use the candidate selection workflow. The candidate selection workflow remains available in the database.

Making a Candidate Selection Workflow the Default Workflow

**Prerequisite**
The candidate selection workflow must be activated.

**Configuration > [Recruiting] Administration > Candidate Selection Workflow**

**Steps**
1. Click the Workflows tab.
2. Click a candidate selection workflow.
4. Click Done.

**Result**
In the Workflows page, a check mark appears in the Default column next to the candidate selection workflow. The candidate selection workflow appears by default when users create a requisition.

Adding a Step to a Candidate Selection Workflow

**Prerequisite**
The step must be activated in order to add it to the candidate selection workflow.

There is no limit on the number of steps that can be used in a candidate selection workflow.

**Configuration > [Recruiting] Administration > Candidate Selection Workflow**

**Steps**
1. Click the Workflows tab.
2. Click a candidate selection workflow.
3. Under the Steps Usage tab, click Add...
4. Select a step.
5. Click Add.
6. Click Done.

Removing a Step from a Candidate Selection Workflow

Prerequisite
The step must be included in the candidate selection workflow.

Configuration > [Recruiting] Administration > Candidate Selection Workflow

Steps
1. Click the Workflows tab.
2. Click a candidate selection workflow.
3. Click the check box next to a step.
4. Click Remove.

Result
The step is no longer included in the candidate selection workflow. A step removed from a candidate selection workflow is not deleted permanently; it is still available in the Steps page and can be reused.

Ordering Steps in a Candidate Selection Workflow

Prerequisite
Steps must have been added to the candidate selection workflow.

Configuration > [Recruiting] Administration > Candidate Selection Workflow

Steps
1. Click the Workflows tab.
2. Click a candidate selection workflow.
3. Click the Steps Usage tab.
4. Select a new position (number) in the list next to the step name.
5. Click Reorder.

Configuring the Details of a Step

Prerequisite
The step must have been added to the candidate selection workflow before configuring it.

Configuration > [Recruiting] Administration > Candidate Selection Workflow

Steps
1. Click the Workflows tab.
2. Click a candidate selection workflow.
3. Click the Steps Usage tab.
4. Click the name of a step.
5. Review the properties of each step.
   "Mandatory" indicates that the step is required to be completed.
   "Restricted" prevents a step from being visible in the Recruiting Center candidate list for those who do not have the permission to see restricted steps. If you make a step Restricted, you must also set the permission "View candidates in steps whose confidentiality level is "Restricted".
   "Allow" allows users to move candidates from one step to another and to complete unfinished tasks at a later time on the selection process.

6. Set notifications so that users receive a message when a step is reached by a candidate.
   a) Select a recipient.
   b) Select a message template.

7. Click Done.

Result
In the Workflow Details page, under the Steps Usage tab, a check icon appears in the Mandatory, Restricted and Allow columns depending of your configuration choices.

Selecting the Default Status of a Step

**Prerequisite**
The step must be created.

Only one status must be defined as the initial status for a specific step.

**Configuration > [Recruiting] Administration > Candidate Selection Workflow > Steps tab**

**Steps**
1. Click on a step.
2. In the Statuses Usage tab, click on the desired status.
3. Select the option *This is the initial status for this step.*
4. Click Done.

**Result**
In the Step Details page, under the Statuses Usage tab, a check mark appears in the Initial column next to the status. The default status is used when a candidate reaches the step.

Creating a Step

**Prerequisite**

**Configuration > [Recruiting] Administration > Candidate Selection Workflow**

**Steps**
1. Click the Steps tab.
2. Click New...
3. Enter a name for the new step and translate it in all available languages.
4. Enter a short name (which appears on the Step tab in the Candidate List of Taleo Recruiting), code, and comments.
5. Complete the Step Information field if you want to provide custom instructions for the step.
Only one text can be entered for each step for each language. A maximum of 1000 text based characters is supported. HTML, rich text format (RTF) and hyperlinks are not supported.

6. Select a reference model. Reference models are used to map steps to reports, emails, EEO status settings in Regulations as well as to other functions used throughout the application. They are also used to determine the status that will trigger the *Employment Equity Information (USA)* recruiting setting.

7. Click the Statuses Usage tab.
   The Rejected and Declined statuses are present by default; they can be removed if desired.

8. Add statuses to the step.
   a) Click Add...
   b) Select statuses.
   c) Click Add.

   a) Select a position (number) in the list for each status.
   b) Click Reorder.

10. Click the Statuses Usage tab.
11. Review the actions tied to the step.
   a) Remove the actions that are not necessary. Select the checkbox next to an action, then click Remove.
   b) Add new actions if necessary. Click Add..., select the desired action, then click Add.
   c) Reorder actions if necessary. Select a position (number) in the list for each action, then click Reorder.

12. Click Done.

### Deleting a Step

**Prerequisite**
The step must not be used in a candidate selection workflow.

**Configuration > [Recruiting] Administration > Candidate Selection Workflow**

**Steps**
1. Click the Steps tab.
2. Select a step.
3. Click .

**Result**
The step no longer appears in the list of steps, and information is permanently deleted from the database.

### Activating a Step

**Prerequisite**
The step must be created.

**Configuration > [Recruiting] Administration > Candidate Selection Workflow**

**Steps**
1. Click the Steps tab.
2. Click a step.
4. Click Done.

**Result**
In the Steps page, a check mark appears in the Available column next to the step. The step is available for selection when creating a candidate selection workflow.

### Deactivating a Step

**Prerequisite**
The step must not be used by a candidate selection workflow.

**Configuration** > [Recruiting] Administration > Candidate Selection Workflow

**Steps**
1. Click the Steps tab.
2. Click a step.
3. Clear the Available option.
4. Click Done.

**Result**
In the Steps page, a check mark no longer appears in the Available column next to the step. The step is removed from the list of steps available when creating a candidate selection workflow. The step remains in the database.

### Creating Custom Instructions for a Step

**Prerequisite**
Only one text can be entered for each step for each language.
Text must be provided for all available languages.
A maximum of 1000 text based characters is supported. HTML, rich text format (RTF) and hyperlinks are not supported.

**Configuration** > [Recruiting] Administration > Candidate Selection Workflow

**Steps**
1. Click the Steps tab.
2. Click a step.
3. Enter text in the Step Information field.
4. Click Done.

**Result**
The instructions appear in a callout located within the Selection Workflow area in the left hand side of a page. The callout displays all step-related instructions for the specific workflow, no matter what step the user has selected. The provided information regarding a step in a candidate selection workflow can explain to users, for example, the purpose of the step, what are the next steps in the workflow, etc.
Adding an Action to a Step

**Prerequisite**
The action must be activated.

*Configuration > [Recruiting] Administration > Candidate Selection Workflow*

**Steps**
1. Click the Steps tab.
2. Click a step.
3. Click the Actions Usage tab.
4. Click Add...
5. Select an action.
6. Click Add.

Adding the Share Action in a Candidate Selection Workflow

**Prerequisite**

*Configuration > Recruiting Administration > Candidate Selection Workflow*

**Steps**
1. Click the *Steps* tab.
2. Click on a step that is included in the candidate selection workflow.
3. Click the *Actions Usage* tab.
4. Click *Add*...
5. Select the *Share Candidate in CSW Assistant* action, then click *Add*.
6. Click *Done*.

**Result**
When recruiters select the Change Step/Status action or the Bypass action in the More Actions menu, a Share candidate option is available in the Candidate Selection Workflow assistant window so that users can share a candidate while the candidate is being progressed in the selection workflow.

In order to share candidates, users must have the Share candidates permission (Configuration > [SmartOrg] Administration > Users > User Types > Recruiting > Candidates).

Removing an Action from a Step

**Prerequisite**
The action must be activated.

*Configuration > [Recruiting] Administration > Candidate Selection Workflow*

**Steps**
1. Click the Steps tab.
2. Click a step.
3. Click the Actions Usage tab.
4. Select an action.
5. Click Remove.

**Result**
The action is no longer available for the step. An action removed is not deleted permanently, it is still available in the Actions tab and can be reused.

**Reordering Actions in a Step**

**Prerequisite**
Configuration > [Recruiting] Administration > Candidate Selection Workflow > Steps tab

**Steps**
1. Click the Steps tab.
2. Click a step.
3. Click the Actions Usage tab.
4. Select a new position (number) in the list next to the action name.
5. Click Reorder.

**Creating a Status**

**Prerequisite**
Configuration > [Recruiting] Administration > Candidate Selection Workflow

**Steps**
1. Click the Statuses tab.
2. Click New...
3. Enter a name for the new status and translate it in all available languages.
4. Enter a code and comments.
5. Select a reference model. Reference models are used to map statuses to a core standard process for reporting and database administration.
6. Select the option "Allow event date entry and modification" (optional).
   This option is used for actions that result in a change of status (that is, Change Status, Move, Bypass, Offer, Hire a Candidate, Candidate has Declined, Reject Candidate). The results displayed in reports will reflect the actual dates when events were performed. Users will be able to enter the date when an event was performed, rather than when it was recorded.
7. Select the option "Activate the corresponding action" if you want the status to be available as an action in the More Actions list.
   This option is available for these statuses: Rejected, Declined, Offer, Verbal Offer, Hired.
8. Add qualifier groups.
   a) Click Add...
   b) Select qualifier groups.
   c) Click Add.
9. Reorder qualifier groups.
   a) Select a position (number) in the list for each qualifier group.
b) Click Reorder.
10. Click Done.

**Result**
The status appears in the Statuses page.

---

**Deleting a Status**

**Prerequisite**
The status cannot be used in a step.

*Configuration > [Recruiting] Administration > Candidate Selection Workflow*

**Steps**
1. Click the Statuses tab.
2. Select a status.
3. Click .

**Result**
The status no longer appears in the list of statuses and is permanently removed from the database.

---

**Activating a Status**

**Prerequisite**
The status must be created.

*Configuration > [Recruiting] Administration > Candidate Selection Workflow*

**Steps**
1. Click the Statuses tab.
2. Click a status.
3. Select the Available option.
4. Click Done.

**Result**
In the Statuses page, a check mark appears in the Available column next to the status. The status is available for selection when creating a step.

---

**Deactivating a Status**

**Prerequisite**
A status must be active in order to deactivate it.

*Configuration > [Recruiting] Administration > Candidate Selection Workflow*

**Steps**
1. Click the Statuses tab.
2. Click a status.
3. Clear the Available check box.
4. Click Done.

**Result**

In the Statuses page, a check mark no longer appears in the Available column next to the status. The status no longer appears in the list of statuses available when creating a step. The status remains in the database.

### Configuring the Details of a Status

**Prerequisite**

The status must be added to the step before configuring it.

*Configuration > [Recruiting] Administration > Candidate Selection Workflow*

**Steps**

1. Click the Steps tab.
2. Click a step.
3. Click the Statuses Usage tab.
4. Click a status.
5. Indicate if the status is the initial status of the step.
6. Determine the step progression level, that is Not Started, In Progress, Completed.
7. Select a *status change button* that is used as a shortcut to change the status of a candidate directly in a candidate file.
8. Select the *Ask for a qualifier* option if you want the user to select a qualifier to motivate the change to this status. This option is available only if the status has qualifiers defined.
9. Select the *Ask for comments* option if you want the user to enter a comment when the change is done to this status.
10. Select the *Interview Scheduling Behavior* option if you want the system to automatically change the status once an interview is scheduled for the step. This option is used with the Interview Scheduling feature only. You can activate the Interview Scheduling Behavior option for statuses related to the 1st, 2nd and 3rd Interview steps. When a recruiter creates a meeting in Taleo Recruiting, if the Interview Scheduling Behavior option is selected in more than one status, the recruiter will have to select the appropriate status in the Action Dialog window. The Interview Scheduling permission must be enabled.
11. Set notifications so that users receive a message when a status is reached by a candidate. Select a recipient, then select a message template.
12. Activate the automatic progression of candidates feature if desired and create conditions.
13. Click Done.

### Adding a Status to a Step

**Prerequisite**

The status must be activated in order to add it to the step.

*Configuration > [Recruiting] Administration > Candidate Selection Workflow*

**Steps**

1. Click the Steps tab
2. Click a step.
3. Click the Statuses Usage tab.
4. Click Add...
5. Select a status.
6. Click Add.
7. Click Done.

Removing a Status from a Step

Prerequisite
You cannot remove a status that was selected as the initial status. You must first select another status that will become the initial status.

Configuration > [Recruiting] Administration > Candidate Selection Workflow > Steps tab

Steps
1. Click the Steps tab
2. Click a step.
3. Click the Statuses Usage tab.
4. Select a status.
5. Click Remove.
6. Click Done.

Result
The status is no longer included in the step. A status removed from a step is not deleted permanently; it is still available in the Statuses page and can be reused.

Ordering Statuses in a Step

Prerequisite
Statuses must be included in the step before ordering them.

Configuration > [Recruiting] Administration > Candidate Selection Workflow

Steps
1. Click the Steps tab
2. Click a step.
3. Click the Statuses Usage tab.
4. Select a new position (number) in the list next to the status name.
5. Click Reorder.
6. Click Done.

Activating an Action

Prerequisite

Configuration > [Recruiting] Administration > Candidate Selection Workflow
Steps
1. Click the Actions tab.
2. Click an action.
3. Select the Available option.
4. Click Done.

Result
In the Actions page, a check mark appears in the Available column next to the action. The action is available for selection when creating a step.

Deactivating an Action

Prerequisite
Configuration > [Recruiting] Administration > Candidate Selection Workflow > Actions tab

Steps
1. Click the Actions tab.
2. Click an action.
3. Clear the Available check box.
4. Click Done.

Result
In the Actions page, a check mark no longer appears in the Available column next to the action. Also, the action is no longer available in the list of actions for selection when creating a step.

Making Comments Mandatory for an Action

Prerequisite
Configuration > [Recruiting] Administration > Candidate Selection Workflow

Steps
1. Click the Actions tab.
2. Click an action.
3. Select the option Make comment mandatory.
4. Click Done.

Result
In the Actions page, a check mark appears in the Comment Mandatory column next to the action and users will need to provide a comment for this action.

Creating a Qualifier

Prerequisite
Configuration > [Recruiting] Administration > Candidate Selection Workflow

Steps
1. Click the Qualifiers tab.
2. Click New...
3. Enter a name for the new qualifier and translate it in all available languages.
4. Enter a code and comments.
5. Select the Available option.
6. Click Done.

**Result**
The qualifier appears in the Qualifiers page.

### Deleting a Qualifier

**Prerequisite**
The qualifier must be deactivated.
The qualifier must not be used in a candidate selection workflow.

**Configuration** > [Recruiting] Administration > Candidate Selection Workflow > Qualifiers

**Steps**
1. Click the Qualifiers tab.
2. Select a qualifier.
3. Click 🗑️.

### Creating a Qualifier Group

**Prerequisite**

**Configuration** > [Recruiting] Administration > Candidate Selection Workflow

**Steps**
1. Click the Qualifier Groups tab.
2. Click New...
3. Enter a name for the new qualifier group and translate it in all available languages.
4. Enter a code and comments.
5. Select the Available option.
6. Click Add to add an existing qualifier or New to create a new qualifier.
7. Select at least one qualifier.
8. Click Done.

**Result**
The qualifier group appears in the Qualifier Groups page. Users have a means to explain why they moved a candidate in the candidate selection workflow or changed the status of a candidate.

### Deleting a Qualifier Group

**Prerequisite**
Qualifier group must not be in use.
**Steps**

1. Click the Qualifier Groups tab.
2. Select a qualifier group.
3. Click .
Bulk Move to the Hire Step/Status

Recruiting Center users can move several candidates to the Hire step/status in a single transaction.

When this feature is activated, users are able to select more than one candidate to move to the Hire step/status. The system performs a verification to see if the number of candidates selected is equal to or less than the number of positions still open. If additional information is required during the hire action, for example the start date, all the information entered will apply to all candidates hired in that action.

This feature supports candidate selection workflows with or without the RSOffer step.

Activating the Bulk Move to Hire Step/Status

Prerequisite

Configuration > [Recruiting] Settings

Steps

1. Click the Simultaneous Hiring of Multiple Candidates setting.
2. Click Edit.
3. Select Yes.
4. Click Save.
Step/Status Change in One Click

Recruiting Center users can access steps and statuses directly in the candidates list without having to select an action in the More Actions list.

For this feature, the Next Action column must be added in a candidate list format.

<table>
<thead>
<tr>
<th>Candidate</th>
<th>Req. Title</th>
<th>Selection Step, Status</th>
<th>Next Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smith, John (1705187820)</td>
<td>AC-Test</td>
<td>New - To be evaluated</td>
<td>Standby</td>
</tr>
<tr>
<td>Devin, Hugo (1705188301)</td>
<td>AC-Test</td>
<td>Hire - Approved</td>
<td>Hired</td>
</tr>
</tbody>
</table>

The Next Action column contains actions that will give access to the next status or step related to a candidate. Actions available in the new column will allow users to:

- Change the status of a candidate to the next completion status (if the step is not already completed).
- Move the candidate to the initial status of the next step if the current step is completed.

Actions available in the Next Action column are Candidate Selection Workflow (CSW) movements only, either a

- Move to the next step in the CSW.
- Change to the completion status within the current step.

If the current status is not a completion status, the action displayed will be a move (change status) to the first completion status of the current step. If the current status is a completion status, then the action will be a move to the next step at the initial status. In a one-step CSW (reference workflow), only statuses configured as a “completion status” will show up as next steps.
Updating Steps and Statuses for Submissions on Different Requisitions

Recruiting Center users can select multiple submissions on different requisitions and update the corresponding step or status.

Recruiting Center users can select several candidate submissions submitted on different requisitions and move them to the next step, bypass the current step, or change the step's status provided all the submissions are at the same step and all the requisitions use the same Candidate Selection Workflow (CSW).

Whichever action users want to perform (move candidate submissions to the next step, change a step's status, or bypass the current step) on multiple submissions, the users require the corresponding user type permission. If users do not have a particular permission, the corresponding action is unavailable for selection.

If users select multiple submissions and some of them do not correspond to the user type permission that governs the action the users want to perform, a message at the end of the updating process indicates which submissions were not updated. Take the case of a user who had a user type that had the Bypass steps: Only if this user is an owner of the requisitions permission. Suppose the user selected multiple candidate submissions on different requisitions and all the submissions were at the 1st Interview step. The user then performed the bypass action to advance the submissions directly to the 3rd Interview step. If the selection included submissions from candidates for whom the user was a collaborator rather than the owner, the system would generate a message listing the submissions that were not updated. The submissions of candidates "owned" by the user would be updated to the 3rd Interview step.

If users change the current step of multiple submissions to Hire and some of the requisitions are then filled, a message is displayed for each filled requisition.

- If there are active offers associated with a filled requisition, the following message is displayed: Once this operation is completed, all openings available for the requisition {Requisition ID} will have been filled. The system will then unpost the requisition. However, you must first rescind all other offers extended to be able to close the requisition.
- If there are no active offers associated with a filled requisition, the following message is displayed: Once this operation is completed, all openings available for the requisition {Requisition ID} will have been filled. If the system is not able to unpost the requisition and change its status to "Filled", the requisition will have to be filled manually and the system will assign a task to {0}. Do you want to hire the selected candidates? If the user answers "No", the action is canceled; none of the submissions selected initially are updated to the Hire step.

While a user is updating the step or status of a selection of submissions on different submissions, the "Send correspondence" check box is available for selection if the individual has a user type that has the following permission and value: **Send correspondence (while changing the status of a candidate in a workflow)** - **Without restriction**. If the value is instead Only if this user is an owner of the requisitions or a collaborator, the check box is displayed only if the individual is the owner of or a collaborator for all of the submissions selected.

While a user is updating the step or status of a selection of submissions on different submissions, the workflow Event Date calendar is available for selection provided that all the submissions selected satisfy the **Set candidate selection workflow event dates** permission for the user type assigned to the user. For example, if the setting value is **Only if this user is an owner of the requisitions or a collaborator**, the user must be the owner of or a collaborator for all of the submissions or Event Date calendar will not be displayed.

**Configuration**

The following permissions are listed because they have an effect not only when a user wants to update a step or status for a single submission but also when multiple submissions are selected for updating as a batch.
<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
</table>
Candidate Progression Status

The candidate progression status indicates the most advanced progression status of a candidate on other requisitions across all positions where the candidate is being considered.

To see the progression status of a candidate, the Progression Status column, represented by this icon, must be added to the candidate list format. Icons are then used to indicate the furthest active progression status of a candidate across all positions where he/she is being considered. When clicking a progression status icon, a tooltip indicates the active status and a date. For example: "Most advanced progression status: New (as of 2011-Oct-17)".

<table>
<thead>
<tr>
<th>Progression Status Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![New Icon]</td>
<td>New</td>
</tr>
<tr>
<td>![Reviewed Icon]</td>
<td>Reviewed</td>
</tr>
<tr>
<td>![Interview Icon]</td>
<td>First, second, and third interview</td>
</tr>
<tr>
<td>![Testing Icon]</td>
<td>Testing</td>
</tr>
<tr>
<td>![Offer Icon]</td>
<td>Offer</td>
</tr>
<tr>
<td>![Hired Icon]</td>
<td>Hired</td>
</tr>
<tr>
<td>![Pipeline Icon]</td>
<td>Pipeline</td>
</tr>
<tr>
<td>![Contact Icon]</td>
<td>Contact</td>
</tr>
</tbody>
</table>

In the scenario below, a candidate has applied to four jobs:

<table>
<thead>
<tr>
<th>Job</th>
<th>Job Status</th>
<th>Candidate Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Active for sourcing</td>
<td>New &gt; To be reviewed</td>
</tr>
<tr>
<td>2</td>
<td>Closed</td>
<td>Interview 2 &gt; To be scheduled</td>
</tr>
<tr>
<td>3</td>
<td>Active for sourcing</td>
<td>Offer &gt; Rejected</td>
</tr>
<tr>
<td>4</td>
<td>Active for sourcing</td>
<td>Interview 1 &gt; To be scheduled</td>
</tr>
</tbody>
</table>

The icon that would appear for this candidate across all contexts would be Interview 1 because it is the furthest active progression status on an active job. Note that both requisition status and candidate status must be active to be considered for the furthest active progression status.

In the Candidates list, the staircase icon remains available and shows the parallel job applications of the candidate. In a job-specific candidate list, the progression status icon may be displayed while the staircase icon may not be displayed if there is only one job application. In the search result list, if the staircase icon is displayed,
the progression status icon is also displayed. If no staircase icon is displayed, the progression status column is empty.

It is recommended to remove the tracking solution (staircase icon) and to replace it with the Progression Status feature in general lists (such as search result lists, folder lists) if you allow users to view the content of requisitions to which a candidate has applied and to which the user has access. In a job-specific candidate list, the staircase icon is visible only when there is at least one concurrent active job application, and the progression status icon is visible as soon as there is one active job application.
Threshold CSW Step - Candidates Hidden from Search Results

The main objective of this feature is to exclude from search results candidates who have reached a specific status to avoid creating additional applications.

Configuration

With the following setting, the system administrator configures what “step” in the candidate selection workflow when reached and still active should prevent candidates from being searched by unauthorized users.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Threshold CSW Step - Hide from Search</td>
<td>Indicates the CSW reference model step at which, once reached, candidates will be excluded from search results (unless the user type has overriding permission). Candidates are excluded from search results once they have reached the threshold step or when they are at a step that comes after the threshold step in the reference model sequence. Possible values are:</td>
<td>Minimum Workflow Sequence</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td></td>
<td>• Not Specified (candidates are never excluded from search result)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• New</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Reviewed</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Declined</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Rejected</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Testing</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Offer</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Minimum Workflow Sequence</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• 1st Interview</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• 2nd Interview</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• 3rd Interview</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The above setting works in conjunction with the following user type permission. The system administrator can specify which user types can view, through searches, candidates who are being considered on other requisitions.
Competitive Workflow Restriction

This feature prevents Recruiting Center users from advancing a candidate in the candidate selection workflow if the candidate is already in an advanced stage of selection (offer or hire step) for another position.

The system can be configured such that if the workflow for one active submission is advanced beyond the selected threshold reference workflow step, users are prevented from advancing the workflow of other submissions for this candidate. When a user attempts such an action, he/she will instead receive a message telling them which submission is blocking them from advancing.

Note that an active submission is a submission where the user is in the step on an active requisition and not at a terminal that ends the workflow, such as Rejected or Withdrawn. In other words, the candidate is still being actively considered on an active requisition or the candidate has been hired.

To enable this feature, the following setting must be configured. System administrators must select the reference workflow step that once reached will invoke blocking the progression on other submissions. If no step is selected, the function is not activated.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Threshold CSW Step - Prevent</td>
<td>Indicates the CSW reference model step at which, once reached, candidates are</td>
<td>Not Specified</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Advancing</td>
<td>locked to the submission and cannot be advanced on other submissions (unless the user type has overriding permission). Possible values are: • Not Specified (candidates are never locked from the submission) • Reviewed • 1st Interview • 2nd Interview • 3rd Interview • Testing • Offer</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

System administrators can grant the following user type permission to bypass this blocking and allow associated users to advance candidates regardless of other submissions:

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advanced candidates in workflow even if already reached the</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User</td>
</tr>
<tr>
<td>threshold step on a different submission</td>
<td>Types &gt; Recruiting &gt; Candidates</td>
</tr>
</tbody>
</table>

When all of the above has been configured, users will only notice a change if all the following elements are true:

• The candidate has two or more submissions.
• One of those submissions is active (not rejected or withdrawn), and its workflow has advanced beyond the threshold step.
• The requisition is active or the candidate is marked as being hired.
• The user tries to advance the workflow of one of the other submissions from this candidate.
• The user does not have user type permission to ignore this restriction.

If all of the above is true, users will see a message informing them that the workflow cannot be advanced. The message will indicate the specific submission that is blocking them from advancing the candidate in the workflow.

Note that the Competitive Workflow Restriction feature is complementary to the feature which hides candidates from search results if they are beyond a threshold step (which is activated by the Threshold CSW Step - Hide from Search setting). See Threshold CSW Step - Candidates Hidden from Search Results.
Automatic Progression of Candidates

When configuring a status used in a step, it is possible to allow candidates to reach the status automatically when specific conditions are met.

This is done by configuring the Automatic Progression of Applications feature in the Status Details page. You can create and edit conditions that will be used to identify candidates who are allowed to reach this status automatically. If setting the condition to be based on the Job Specific Submission for the candidate having all the required criteria or not, it is recommended that the prescreening questions and competencies be mandatory as part of the application process, so that the automatic progression can progress properly. If a candidate completes the submission but does not answer the prescreening questions and competencies because they were not mandatory, the candidate will be viewed as not having the required criteria and could not therefore progress based on that.

Another option for the automatic progression of candidates is based on Screening Services results. Passport is responsible for handling requests to and from external service providers. It communicates with other modules in order to maintain requests up to date and interacts with the assessment platform to request assessment evaluations. The automatic progression of submissions automates the candidate selection workflow process based on the results obtained by Passport external services.

Activating the Automatic Progression of Candidates

**Prerequisite**

Requisition and candidate statuses must be active to consider a candidate for the furthest active progression status.

Tracking solution must be removed.

*Configuration > [Recruiting] Administration > Candidate Selection Workflow*

**Steps**

1. Click the Steps tab.
2. Click a step.
3. Click the Statuses Usage tab.
4. Click a status.
5. Select the option *Allow candidates to reach this status automatically when the (optional) conditions specified below are met.*
6. Click Create a Condition...
7. Complete the fields.

The list of available condition providers will vary according to the providers selected at your organization. Information will vary according to service selected. For more information on available services, please contact your Taleo representative.

8. Click Done.
9. Click Done.

**Result**

The automatic progression feature is now activated for the status so that candidates can reach a status automatically when specified conditions are met.
Automatic Progression of Candidates using Fields

Candidates can automatically be progressed in the candidate selection workflow based on certain fields present in their job submission.

When configuring a status in a candidate selection workflow, system administrators can create automatic progression rules based on specific job-submission field values.

Specific standard fields in these categories can be used to create automatic candidate progression rules:

- Personal Information
- Work Conditions
- Work Experience
- Education
- Certifications
- References
- Contingent Staffing
- Evaluation Management
- Other

For a list of specific standard fields supported to create auto-progression conditions, see Standard Fields for Automatic Progression of Candidates.

User-defined fields in these categories can also be used:

- Education
- Personal Information
- Work Experience

Automatic candidate progression rules based on specific fields can be used for different purposes. For example, to automatically bypass workflow steps for internal candidates. Let's say that a company has a candidate selection workflow based on the candidate being an internal candidate (employee) or an external candidate. The way the system knows if a candidate is an employee is based on the Internal Candidate field being selected. When an employee applies for a job, the system verifies the Internal Candidate field and if the field is selected, the candidate is automatically progressed to the specified status in the workflow.
Automatic candidate progression rules allow progressing candidates to a later status within the same step. It is however possible to move candidates to another step by enabling the automatic progression on the initial status of a step. This way, candidates being on the completion status of a step will be moved to the step where automatic progression is enabled on the initial status. Note that if there are mandatory steps in between the two steps, the automatic progression will not occur. This feature also allows to connect multiple automatic progression rules one after the others in order to move candidates to a later step and progress them to a specific status within that step.

**Standard Fields for Automatic Progression of Candidates**

<table>
<thead>
<tr>
<th>Personal Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accepts Job Posting Notifications</td>
</tr>
<tr>
<td>Address (line 1)</td>
</tr>
<tr>
<td>Address (line 2)</td>
</tr>
<tr>
<td>Advance Notice</td>
</tr>
<tr>
<td>Anonymous job submission</td>
</tr>
<tr>
<td>Application Medium</td>
</tr>
<tr>
<td>Cellular Number</td>
</tr>
<tr>
<td>City</td>
</tr>
<tr>
<td>Cover Letter</td>
</tr>
<tr>
<td>Currency</td>
</tr>
<tr>
<td>Education Level</td>
</tr>
<tr>
<td>Email Address</td>
</tr>
<tr>
<td>Employee Number</td>
</tr>
<tr>
<td>Employee Status</td>
</tr>
<tr>
<td>Fax Number</td>
</tr>
<tr>
<td>First Name</td>
</tr>
<tr>
<td>Home Phone Number</td>
</tr>
<tr>
<td>Internal Candidate</td>
</tr>
<tr>
<td>Job Level</td>
</tr>
<tr>
<td>Job Type</td>
</tr>
<tr>
<td>Last Name</td>
</tr>
<tr>
<td>Middle Name</td>
</tr>
<tr>
<td>Minimum Annual Salary</td>
</tr>
<tr>
<td>Pager Number</td>
</tr>
<tr>
<td>Place of Residence</td>
</tr>
<tr>
<td>Preferred Job</td>
</tr>
<tr>
<td>Preferred Location</td>
</tr>
<tr>
<td>Preferred Organization</td>
</tr>
<tr>
<td>Prefix</td>
</tr>
<tr>
<td>Primary Number</td>
</tr>
<tr>
<td>Resume</td>
</tr>
<tr>
<td>Schedule</td>
</tr>
<tr>
<td>Social Security Number</td>
</tr>
<tr>
<td>Suffix</td>
</tr>
<tr>
<td>Travel</td>
</tr>
<tr>
<td>Website Address</td>
</tr>
<tr>
<td>Work Phone Number</td>
</tr>
<tr>
<td>Zip/Postal Code</td>
</tr>
</tbody>
</table>
### Work Conditions
- Currency
- Expected Hourly Pay Rate
- Hours per week willing to work
- Hours per week, preferred
- Willing to work on holidays
- Willing to work on weekends

### Work Experience
- Achievements
- Current Job
- May we contact the supervisor?
- Name During Employment
- Supervisor's Email Address
- Supervisor's Name
- Supervisor's Phone
- Supervisor's Title

### Education
- City
- Education Level (Achieved)
- GPA
- GPA out of
- Graduated from High School or GED
- Location
- Student name while attending the program

### Certifications
- Location
- Number/ID
- Organization
- GPA
- GPA out of
- Prescreening score
- Completed Questionnaires
- Questionnaire Average Score
- Background Check Consent
- eSignature complete
- Application State
- Worker Type

---

**Creating a Rule to Automatically Progress Candidates Based on Job-Submission Fields**

**Prerequisite**

*Configuration > Recruiting Administration > Candidate Selection Workflows*

**Steps**

1. Click the *Steps* tab.
2. Click a step.
3. Click the *Statuses Usage* tab.
4. Click a status.
5. Select the option *Allow candidates to reach this status automatically when the (optional) conditions specified below are met*.
6. Click *Create a Condition...*
7. Provide a name to the condition.
8. In the *Condition Statement* section, select *Job-specific submission* in the first drop-down menu.
9. Select Standard Field or User-defined Field.
10. Select other elements to create the condition.
11. Click *Done*.
12. Click *Done*.

**Result**

The auto-progression rule is now activated and candidates can reach the step automatically when specified conditions are met.
Candidate Selection Workflow Priority

The candidate selection workflow priority ensures that the most appropriate workflow is displayed to the Recruiting Center user when they create a requisition.

The system can sort candidate selection workflows (CSW) according to the level of compatibility and ensure that the most appropriate workflow is displayed when a user is creating a requisition.

The system administrator must identify one CSW as the company default workflow. However, the default workflow will be preselected only if no other workflow is found to be compatible to the requisition or if other workflows are compatible because they are linked to all Organization, Location and Job Field (all-all-all).

The system automatically preselects the most compatible workflow as follows:

• The system makes the sum of the differences between the levels specified in the workflow and in the requisition.
• The workflow with the least differences is the one displayed in the Candidate Selection Workflow field.
• In case of a tie, the sort is performed on the code of the workflows.

A workflow with no value (Null) for a dimension (Organization, Location or Job Field) will consequently be associated to all structure elements from that dimension. However, associating a workflow to no specific value (equivalent to all) will penalize its level of compatibility. Hence, a workflow tied to all-all-all will be much less pertinent than a workflow with the slightest specificity in its categorization.

Example:

<table>
<thead>
<tr>
<th>Organization</th>
<th>Location</th>
<th>Job Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food Processing/Food Production</td>
<td>United States/California/Los Angeles</td>
<td>Cashier</td>
</tr>
</tbody>
</table>

Workflow 1: There is no difference between the Organization-Location-Job Field information of this workflow and that of the requisition.

<table>
<thead>
<tr>
<th>Code</th>
<th>Organization</th>
<th>Location</th>
<th>Job Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSW1</td>
<td>Food Processing/Food Production</td>
<td>United States/California/Los Angeles</td>
<td>Cashier</td>
</tr>
<tr>
<td>Difference</td>
<td>(0)</td>
<td>(0)</td>
<td>(0)</td>
</tr>
</tbody>
</table>

Workflow 2: Because there is no job field, the sum of the difference is 20.

<table>
<thead>
<tr>
<th>Code</th>
<th>Organization</th>
<th>Location</th>
<th>Job Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSW2</td>
<td>Food Processing/Food Production</td>
<td>United States/California/Los Angeles</td>
<td>All</td>
</tr>
<tr>
<td>Difference</td>
<td>(0)</td>
<td>(0)</td>
<td>(20)</td>
</tr>
</tbody>
</table>

Workflow 3: There is a difference of one level in the Organization dimension, and a difference of two levels in the Location dimension, so the sum of the differences is 3.
<table>
<thead>
<tr>
<th>Code</th>
<th>Organization</th>
<th>Location</th>
<th>Job Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSW3</td>
<td>Food Processing</td>
<td>United States</td>
<td>Cashier</td>
</tr>
</tbody>
</table>

Workflow 4: There is no difference between the Organization-Location-Job Field information of this workflow and that of the requisition.

<table>
<thead>
<tr>
<th>Code</th>
<th>Organization</th>
<th>Location</th>
<th>Job Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSW4</td>
<td>Food Processing/Food Production</td>
<td>United States/California/Los Angeles</td>
<td>Cashier</td>
</tr>
</tbody>
</table>

Workflow 5: Since no dimension is specified in this workflow, the sum of the differences is 60.

<table>
<thead>
<tr>
<th>Code</th>
<th>Organization</th>
<th>Location</th>
<th>Job Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSW5</td>
<td>All</td>
<td>All</td>
<td>All</td>
</tr>
</tbody>
</table>

Workflow 6: Once again, since no dimension is specified in this workflow, the sum of the differences is 60. However, this is the default workflow.

<table>
<thead>
<tr>
<th>Code</th>
<th>Organization</th>
<th>Location</th>
<th>Job Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSW6</td>
<td>All</td>
<td>All</td>
<td>All</td>
</tr>
</tbody>
</table>

Workflow 7: The location of this workflow is not compatible with that of the requisition. This means that this workflow is excluded. In this example, the workflow that would be displayed in the Candidate Selection Workflow field is Workflow 4 (a_csw4), because even though Workflow 1 (z_csw1) and 4 are tied and have the lowest sum of differences, Workflow 4 will be displayed first when a sort is performed on the code.

<table>
<thead>
<tr>
<th>Code</th>
<th>Organization</th>
<th>Location</th>
<th>Job Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSW7</td>
<td>Food Processing/Food Production</td>
<td>United States/California/San Jose</td>
<td>Cashier</td>
</tr>
</tbody>
</table>

Difference

<table>
<thead>
<tr>
<th>Code</th>
<th>Organization</th>
<th>Location</th>
<th>Job Field</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Candidate and Requisition Search

- Candidate Search.................................................................247
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- Search Queries.................................................................281
- Data Segmentation............................................................283
Candidate Search

Candidate Quick Search

The candidate quick search allows Recruiting Center users to quickly find specific candidates.

The candidate quick search is available at the top right hand corner of the Recruiting Center pages. It is available to Recruiting Center users if settings were configured and if user type permissions were granted.

When performing a candidate quick search, the search engine searches for candidates who applied on a job, submitted a profile, or are registered but did not apply on a job (could be a person who referred a friend for a job and who had to register himself/herself as a new user, or a person who registered himself/herself while clicking My Account).

The candidate quick search engine searches information in the following fields of the candidate file:

- first name
- last name
- middle name
- email address
- candidate identification number (you must use at least three numbers (coupled with wildcards) of the total identification number, otherwise the search will not work)

When performing a candidate search, users can enter partial names (either the first or last name with the * wildcard) or complete names in the field. However, a best practice is to enter complete names to obtain better results.

Users can also perform a search with a middle initial if they know the person's full name (example: Sam P Jones). If searching for someone who's first name contains initials, we recommend entering just the initials (example: Jr. will give you the following results: Jr., j.r., or JR).

If looking for someone who hyphenates his/her name, it is not required to enter both names. Let’s say Smith-Jones is the name you are looking for. Entering Smith, Jones, Smith space Jones or Smith-Jones, will bring back Smith-Jones.

The candidate quick search searches for all the search terms in the above mentioned five fields. Note that it works only for users having access to all the fields. For example, if the email field is hidden for a user type, searching by name will not work. For this reason, the specific candidate search often produces search results that are more relevant than those generated by the candidate quick search.

Configuring the Candidate Quick Search

The configuration of the candidate quick search consists of the following steps.

1. **Enabling the Search Widget setting.**
2. **Granting the candidate quick search permission.**
3. **Setting the security level** for the First Name, Middle Name, Last Name, and Email Address fields so that users can see these fields and search on them.
4. **Creating a list format to display search results.** You can also use the default list format or modify it.
5. **Assigning a list format variation to configuration profiles.**

The candidate quick search allows users to search information in the following fields: first name, last name, middle name, email address, candidate ID. If you do not want these fields to be visible to certain users, do not give them access to the candidate quick search. Otherwise, they will be able to perform a quick search but no candidates will be returned.

### Enabling the Search Widget Setting

**Prerequisite**

*Configuration > [SmartOrg] Administration > [Users] Configuration Profiles*

**Steps**

1. Click a configuration profile.
2. Locate the Search Widget setting using the Refine by feature.
3. Click the Search Widget setting.
4. Click Edit.
5. Select the Yes value.
6. Click Save.

### Granting the Candidate Quick Search Permission

**Prerequisite**

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

**Steps**

1. Click a user type.
2. Click the Recruiting functional domain.
3. Click Edit next to Search.
4. Select the Access candidate Quick and Specific search permission.
5. Click Save.

### Setting the Security Level of a Field

**Prerequisite**

*Configuration > [Recruiting] Administration > Fields*

**Steps**

1. Click a field category.
2. Click the name of a field.
3. Click Edit Field Availability.
4. Select the security level of the field: General, Restricted, Confidential.
5. Click Save.

### Creating a List Format for Quick Search Results

**Prerequisite**

*Configuration > [Recruiting] Administration > List Formats*
Steps

1. Click on the Candidate tab.
2. Select a variation in the Show list.
3. Click the Search Results / Quick Search list format context.
4. In the Context Details page, under the Formats for this Context tab, click New...
5. Provide a name for the list format.
6. Translate the name of the list format using the Languages list located on the top right hand side of the page.
7. Optional: Enter comments.
8. Optional: You can specify if the list format you are creating will be the default list format for the context.
9. Choose the desired columns by selecting the check box next to each column name.
10. Order columns in the list format by selecting a number in the Sequence Number column then click Reorder.
11. Sort files in the list according to a specific criterion. Up to three different sorting criteria can be specified.
   a) To select a criterion, click ▲ in the Sort By column next to the desired column name.
   b) To select a second sorting criterion, click ▲ in the Then by column next to the desired column name.
   c) To select a third sorting criterion, click ▲ in the second Then by column next to the desired column name.
   d) To select ascending or descending sorting order, click ▲ repeatedly.
12. Optional: You can select the Group records by first sort criterion option if you want to group files in the list format.
13. Click the Active check box to activate the list format.
14. Click Done.

Result
The list format appears in the Context Details page, under the Formats for this Context tab.

Assigning the List Format to a Configuration Profile and User Account

Prerequisite
Configuration > [SmartOrg] Administration > Configuration Profiles

Steps

1. Click on a configuration profile.
2. Click on the Requisition List Format or the Candidate List Format setting.
3. Click Edit.
4. Select a variation.
5. Click Save.
6. Go back to the SmartOrg Administration menu.
7. Click User Accounts.
8. Click on a user account.
9. Click Edit next to Account Information.
10. Select a configuration profile.
11. Click Save.

**Candidate Quick Search - Permissions and Settings**

The following permissions and settings are used to configure the candidate quick search.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access candidate Quick and Specific search</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Search</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search Widget</td>
<td>Displays the search widget.</td>
<td>Yes</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] Configuration Profiles</td>
</tr>
<tr>
<td>Quick Search Candidate Pool Size</td>
<td>Indicates the maximum number of candidates returned by a quick search. This is a private setting that is activated by Oracle Support.</td>
<td>300</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Search Results Default Limit</td>
<td>Maximum number of search results. This is a protected setting that is activated by Oracle Support.</td>
<td>300</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
</tbody>
</table>

**Candidate Specific Search**

The specific candidate search can be considered to be an extension of the candidate quick search in that it offers greater result precision.

The specific candidate search is available at the top right hand corner of the Recruiting Center pages. It is available to Recruiting Center users if settings were configured and if user type permissions were granted.

If Recruiting Center users have the permission to access candidate identification information, the candidate search will allow them to search by:
• candidate identification number only (you must use at least two numbers of the total identification number or more, otherwise the search will not work)
• candidate first name
• candidate last name
• candidate first and last names
• e-mail address

Using the specific candidate search, users can enter the same or different search terms in any of the four fields. For this reason, the specific candidate search often produces search results that are more relevant than those generated by the candidate quick search.

Wild card can be used with one or two characters in the specific candidate search, to support searching for combined words. For example, d* in first name and monroe in last name will return all monroe with first name starting by d.

Configuring the Candidate Specific Search

The configuration of the specific candidate search consists of the following steps.

1. Enabling the Search Widget setting.
2. Granting the candidate specific search permission.
3. Creating a list format to display search results. You can also use the default list format or modify it.
4. Assigning a list format variation to configuration profiles.

Enabling the Search Widget Setting

Prerequisite

Configuration > [SmartOrg] Administration > [Users] Configuration Profiles

Steps

1. Click a configuration profile.
2. Locate the Search Widget setting using the Refine by feature.
3. Click the Search Widget setting.
4. Click Edit.
5. Select the Yes value.
6. Click Save.

Granting the Candidate Specific Search Permission

Prerequisite

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

Steps

1. Click a user type.
2. Click the Recruiting functional domain.
3. Click Edit next to Search.
4. Select the Access candidate Quick and Specific search permission.
5. Click Save.
Creating a List Format for Quick Search Results

**Prerequisite**

*Configuration* > [Recruiting] Administration > List Formats

**Steps**

1. Click on the Candidate tab.
2. Select a variation in the Show list.
3. Click the Search Results / Quick Search list format context.
4. In the Context Details page, under the Formats for this Context tab, click New...
5. Provide a name for the list format.
6. Translate the name of the list format using the Languages list located on the top right hand side of the page.
7. Optional: Enter comments.
8. Optional: You can specify if the list format you are creating will be the default list format for the context.
9. Choose the desired columns by selecting the check box next to each column name.
10. Order columns in the list format by selecting a number in the Sequence Number column then click Reorder.
11. Sort files in the list according to a specific criterion. Up to three different sorting criteria can be specified.
   a) To select a criterion, click ▲ in the Sort By column next to the desired column name.
   b) To select a second sorting criterion, click ▲ in the Then by column next to the desired column name.
   c) To select a third sorting criterion, click ▲ in the second Then by column next to the desired column name.
   d) To select ascending or descending sorting order, click ▲ repeatedly.
12. Optional: You can select the Group records by first sort criterion option if you want to group files in the list format.
13. Click the Active check box to activate the list format.
14. Click Done.

**Result**

The list format appears in the Context Details page, under the Formats for this Context tab.

Assigning a List Format Variation to Configuration Profiles

**Prerequisite**

*Configuration* > [SmartOrg] Administration > [Users] Configuration Profiles

**Steps**

1. Click a configuration profile.
2. Click the Candidate List Format setting.
3. Click Edit.
4. Select a list format variation in the Value drop-down list.
5. Click Save.
6. Click the Requisition List Format setting.
7. Click Edit.
8. Select a list format variation in the Value drop-down list.
9. Click Save.
10. Go back to the SmartOrg Configuration menu.
11. Click User Accounts.
12. Click a user account.
13. Click Edit next to Account Information.
14. Select a configuration profile.
15. Click Save.

**Candidate Specific Search - Permissions and Settings**

The following permissions and settings are used to configure the candidate quick search.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access candidate Quick and Specific search</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Search</td>
</tr>
<tr>
<td>Access candidate identification and contact information</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Candidate</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search Widget</td>
<td>Displays the search widget.</td>
<td>Yes</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] Configuration Profiles</td>
</tr>
<tr>
<td>Quick Search Candidate Pool Size</td>
<td>Indicates the maximum number of candidates returned by a quick search. This is a private setting that is activated by Oracle Support.</td>
<td>300</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Search Results Default Limit</td>
<td>Maximum number of search results. This is a protected setting that is activated by Oracle Support.</td>
<td>300</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
</tbody>
</table>

**Candidate Advanced Search**

The Candidate Advanced Search allows Recruiting Center users to search for candidates using an array of criteria that are different than the ones used in the quick search feature.

The Candidate Advanced Search enables users to find and match relevant candidates to their open requisitions. Users can create search queries using keywords to search across numerous text fields of the candidate file and combine them with specific fields such as prescreening questions and skills that typically produce search that have a higher degree of precision.
The Candidate Advanced Search is available at the top right hand corner of the Recruiting Center pages. It is available to Recruiting Center users if settings were configured and if user type permissions were granted.

**Configuring the Candidate Advanced Search**

The configuration of the candidate advanced search consists of the following steps.

1. *Enabling the Advanced Search Links setting.*
2. *Granting the candidate advanced search permission.*
3. *Creating a list format to display advanced search results.* You can also use the default list format or modify it.
4. *Assigning a list format variation to configuration profiles.*

**Enabling the Advanced Search Links Setting**

**Prerequisite**

*Configuration > [SmartOrg] Administration > [Users] Configuration Profiles*

**Steps**

1. Click a configuration profile.
2. Locate the Advanced Search Links setting using the Refine by feature.
3. Click the Advanced Search Links setting.
4. Click Edit.
5. Select the Yes value.
6. Click Save.

**Granting the Candidate Advanced Search Permission**

**Prerequisite**

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

**Steps**

1. Click a user type.
2. Click the Recruiting functional domain.
3. Click Edit next to Search.
4. Select the Access advanced search permission.
5. Click Save.

**Creating a List Format for Advanced Search Results**

**Prerequisite**

*Configuration > [Recruiting] Administration > List Formats*
Steps
1. Click the Candidate tab.
2. Select a variation in the Show list.
3. Click the Search Results / Advanced Search list format context.
4. In the Context Details page, under the Formats for this Context tab, click New...
5. Provide a name for the list format.
6. Translate the name of the list format using the Languages list located on the top right hand side of the page.
7. Optional: Enter comments.
8. Optional: You can specify if the list format you are creating will be the default list format for the context.
9. Choose the desired columns by selecting the check box next to each column name.
10. Order columns in the list format by selecting a number in the Sequence Number column then click Reorder.
11. Sort files in the list according to a specific criterion. Up to three different sorting criteria can be specified.
   a) To select a criterion, click ▲ in the Sort By column next to the desired column name.
   b) To select a second sorting criterion, click ▲ in the Then by column next to the desired column name.
   c) To select a third sorting criterion, click ▲ in the second Then by column next to the desired column name.
   d) To select ascending or descending sorting order, click ▲ repeatedly.
12. Optional: You can select the Group records by first sort criterion option if you want to group files in the list format.
13. Click the Active check box to activate the list format.
14. Click Done.

Result
The list format appears in the Context Details page, under the Formats for this Context tab.

Assigning a List Format Variation to Configuration Profiles
Prerequisite
Configuration > [SmartOrg] Administration > [Users] Configuration Profiles
Steps
1. Click a configuration profile.
2. Click the Candidate List Format setting.
3. Click Edit.
4. Select a list format variation in the Value drop-down list.
5. Click Save.
6. Click the Requisition List Format setting.
7. Click Edit.
8. Select a list format variation in the Value drop-down list.
9. Click Save.
10. Go back to the SmartOrg Configuration menu.
11. Click User Accounts.
12. Click a user account.
13. Click Edit next to Account Information.
14. Select a configuration profile.
15. Click Save.

**Candidate Advanced Search - Permissions and Settings**

The following permissions and settings are used to configure the candidate advanced search.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access advanced search</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Search</td>
</tr>
<tr>
<td>Other search permissions are available in the Search functional domain.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Search</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advanced Search Links</td>
<td>Displays the advanced search links.</td>
<td>Yes</td>
<td>Configuration &gt; [SmartOrg Administration] Configuration Profiles</td>
</tr>
<tr>
<td>Advanced Search Toolbar</td>
<td>Displays the advanced search toolbar.</td>
<td>Yes</td>
<td>Configuration &gt; [SmartOrg Administration] Configuration Profiles</td>
</tr>
<tr>
<td>Advanced Search &quot;Save Query&quot; Button</td>
<td>Displays the &quot;Save Query&quot; button in the advanced search page.</td>
<td>Yes</td>
<td>Configuration &gt; [SmartOrg Administration] Configuration Profiles</td>
</tr>
<tr>
<td>Default &quot;Advanced Search&quot; Field Configuration</td>
<td>Displays the selection of fields that are available to the user when performing an advanced search.</td>
<td>Variation 1</td>
<td>Configuration &gt; [SmartOrg Administration] Configuration Profiles</td>
</tr>
<tr>
<td>Activate Segmentation in Search</td>
<td>Indicates if candidate search results are restricted based on the coverage area of the search user’s groups and staffing types.</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Display Incomplete Application</td>
<td>Display incomplete submissions in candidate list and in candidate search results. This is a Protected setting activated by Oracle Support. This setting does not apply to the Candidate Quick Search.</td>
<td>Yes</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Display Identification Missing Candidates</td>
<td>Include candidates whose identification is missing in candidate list and in candidate search results (does not apply to Quick Search).</td>
<td>Yes</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Setting</td>
<td>Description</td>
<td>Default Value</td>
<td>Location</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------</td>
<td>---------------------------------</td>
</tr>
<tr>
<td>Candidate Search Mask Processed</td>
<td>Exclude candidates in selection process on open requisitions from candidate search results in the advanced search.</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Threshold CSW Step - Hide from Search</td>
<td>Indicates the CSW reference model step beyond which candidates will be excluded from search results (unless user type has overriding permission).</td>
<td>New</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
</tbody>
</table>
| OFCCP Search Trace Activation               | Defines if customers want to archive search criteria. Part of OFCCP regulation. This is a protected setting activated by Oracle Support. ][  
<p>|                                             | • Disabled: The feature is disabled.                                         | Disabled       | Configuration &gt; [Recruiting] Settings |
|                                             | • Enabled (without requisition identification): The feature is always enabled. |               |                                  |
|                                             | • Mandatory (with requisition identification): An error message appears if users forget to specify a requisition in order to archive data. |               |                                  |
|                                             | • Optional (with requisition identification): Users may select the option and specify a requisition in order to archive data. |               |                                  |
| OFCCP Search Trace Candidate IDs Activation | Defines if system will archive search criteria as well as search results (candidates IDs). Part of OFCCP regulation. This setting can be activated only if the Search Regulation Trace Functionality setting is activated. This is a protected setting activated by Oracle Support. | Yes           | Configuration &gt; [Recruiting] Settings |
| Search Randomize Enabled                    | Randomized search results activated. This is a protected setting activated by Oracle Support. | No            | Configuration &gt; [Recruiting] Settings |
| Search Results Default Limit                | Maximum number of search results. This is a protected setting activated by Oracle Support. | 300            | Configuration &gt; [Recruiting] Settings |</p>
<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
</table>
| Activate exact match for search using structured fields (OLF)| When enabled, the result of the candidate search using required criteria for place of residence or OLF preferences will display only candidates with exact match at the same level or below. No parent or empty value will be returned. When set to Yes, the result of the candidate advanced search using required criteria for Place of Residence or OLF preferences will display only candidates with exact match at the same level. No parent or empty value will be returned. It is recommended to enable this setting if importing a lot of candidates without preferences. Do not enable the setting:  
  • If you wish to take into consideration the candidates' broad preferences. If candidates apply online, they usually have preferences inherited from job submission or set in their profile.  
  • Because it excludes candidates that are willing to work on the search criteria. | Yes            | Configuration > [Recruiting] Settings                                                                                                                                     |
| Attachments searched by Candidate Keyword Search             | Determines the list of attachments searched by the Candidate Advanced Search with keywords. Possible values are:  
  • All Attachments  
  • All Candidate Visible  
  • All Resumes  
  When "All Resumes" is selected, the system will only search attachments tagged as resumes. | All Candidate Visible | Configuration > [Recruiting] Settings                                    |
<p>| Content searched by Candidate Keyword Search                 | Determines the list of candidate profile fields searched by Candidate Advanced Search with keywords. It is recommended that the setting be set to &quot;Optimal&quot; for | Optimal        | Configuration &gt; [Recruiting] Settings                                    |</p>
<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>optimal search results. The &quot;Legacy&quot; value should only be chosen to revert to original list of profile fields used prior to 13C – primarily to include &quot;comments&quot; in keyword search.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Advanced Candidate Search Form

Because system administrators can customize the Advanced Candidate Search form, the search form might have a different layout in different zones and even for different users, based on their configuration profile.

By default, the following search criteria are included in the Advanced Candidate Search form:

- Keywords
- Last Update
- Place of Residence

Users who have the required permission can add other search criteria provided they were made available by the system administrator. This is done using the Customize... button. For a list of fields available for the Candidate Advanced Search, see [Advanced Search Fields](#).

For many search fields, users can specify an additional criterion:

- **Required**: Only candidates with that criterion are retrieved.
- **Excluded**: Candidates with that criterion are excluded.
- **Desired**: Candidates with that criterion are considered more relevant than those without the criterion.

Users may also have the ability to search on precise Organization-Location-Job Field (OLF) elements without incorporating candidates with parent preferences or null values in preferences. When this feature is enabled, if a user is performing a Candidate Advanced Search using Place of Residence as a Required criteria or Organization-Location-Job Field as a Required criteria, search results will display only candidates with an exact match at the same level. No parent or empty value will be returned. For example, searching for San Francisco will no longer return candidates within California, United States or that have an empty preference value.

When users perform an advanced search and enter a value in the Institution, Program, Employer, Job Function or Certification fields, the system looks for candidates who have the same value in the corresponding structured field as well as in the corresponding "Others" field. The system uses the OR operator for these fields.

Additionally, a user can specify a value in the "Other" field of the same Institution, Program, Employer, Job Function or Certification block and the system will look for candidates who have the value in the "Other" field or the corresponding structured field. For example, if a recruiter performs an advanced search and enters "Oracle" in the Employer field and “Oracle*” in the Other Employer Field, the system will return candidates who have an Employer field with "Oracle" and or an "Other Employer" field with text starting with "Oracle".

Two search options are available on the left side of the Advanced Candidate Search page: “Archive search criteria for requisition” and “Random results”. These options support OFCCP requirements and are usually activated only for customers located in the United States through protected settings. The Archive search criteria for requisition field, once activated, can be optional or mandatory. Once a requisition is entered in this field, the search query and search results are kept in a log file and the retrieved candidates cannot be hard deleted from the database for the next two years. The Random results option generates a different set of candidates who match the required fields every time you run the same search if the total number of candidates matching your criteria is above the number of displayed candidates, usually set to 300. For details, see [Search Results Archiving](#) and [Randomized Search Results](#).
When performing a Candidate Advanced Search, the more you add search criteria, the narrower the scope of your search will be, typically resulting in fewer but more pertinent results. By adding multiple occurrences of the same criteria, you broaden the scope of your search, typically resulting in more search results.

A best practice is to start your Candidate Advanced Search with only a few criteria, and to then narrow your search down by going back to your search query and entering one or more additional search criteria. Your search results will then contain fewer candidates. It is simpler and more efficient to start with a general search and then need to broaden the search in order to obtain a viable candidate pool.

The search engine can retrieve any number of candidate files although, for performance and management reasons, only 300 are displayed. By default, we suggest to display the top 300 by relevancy.

### Configuring the Advanced Candidate Search Form

The Candidate Search Page feature allows system administrators to select search criteria that will be available to Recruiting Center users when performing an advanced candidate search.

1. **Identifying fields as search criteria.**
2. **Customizing the Advanced Candidate Search form.**
3. **Associating the advanced search form to configuration profiles.** You can define for each available configuration profile, the fields that will be available in the Advanced Search page. Therefore, depending on the selections you make for each configuration profile, the fields displayed to users linked to different configuration profiles will differ.
4. **Granting the “Customize advanced search queries permission” to allow users to customize the Advanced Candidate Search.**

When configuring the advanced candidate search page, be sure to only include fields in the form that you want users to use. If users have the permission to perform an advanced candidate search, they will have the ability to use any fields that you have included in the form regardless of viewing permissions for the fields. When search results are displayed, if users are not allowed to view internal and/or external candidates, the field will appear in the list if the column is present and the word "Confidential" will appear instead of the data in situations where users cannot view the data.
Identifying a Field as a Search Criterion

**Prerequisite**

*Configuration > [Recruiting] Administration > Fields*

**Steps**

1. Click a field category.
2. Click a field.
3. Click Edit Field Availability next to Properties.
4. Select Candidate Search.
5. Click Save.

**Result**

In the Fields list, Candidate Search appears in the Availability column. The field is available in the Candidate Search Page feature.

Customizing the Advanced Candidate Search Form

**Prerequisite**

The Candidate Search option in the Properties page of a field must be selected for a field to appear in the Available Fields list.

When customizing the advanced candidate search form, be sure to only include fields in the form that you want Recruiting Center users to use. If a user has the permission to perform an advanced candidate search, he/she will have the ability to use any fields that you have included in the form regardless of viewing permissions for the fields. When search results are displayed, if the user is not allowed to view internal and/or external candidates, the field will appear in the list if the column is present and the word "Confidential" will appear instead of the data in situations where the user cannot view the data.

*Configuration > [Recruiting] Administration > Candidate Search Page*

**Steps**

1. Select a field in the Available Fields list.
2. Click Add.
3. Click Save.

**Result**

The field appears in the Selected Fields list. It is available to Recruiting Center users when customizing the advanced candidate search form provided they have access to the advanced search.

Associating a Default Advanced Search Form to Configuration Profiles

**Prerequisite**

*Configuration > [SmartOrg] Administration > [Users] Configuration Profiles*

**Steps**

1. Select a configuration profile.
2. Click on the Default "Advanced Search" Field Configuration setting.
3. Click Edit.
4. Select Variation 1, 2, or 3.
5. Click Save.
Result

If you do not not configure a specific selection of fields for a given configuration profile, or if a user is not linked to a configuration profile, then only the default set of fields will be available in the Recruiting Center when customizing a search query.

Granting the "Customize advanced search queries" Permission

Prerequisite

Configuration > [SmartOrg] Administration [Users] User Types

Steps

1. Click a user type.
2. Click the Recruiting functional domain.
3. Click Edit next to Search.
4. Select the Customize advanced search queries permission.
5. Click Save.

Candidate Advanced Search Fields

The table presents fields available in the Advanced Candidate Search page.

To be available to Recruiting Center users, these fields must first be made available by system administrators. Then, users who have the required permission can add these fields in the Advanced Candidate Search page using the Customize... button.

<table>
<thead>
<tr>
<th>Fields Available in the Advanced Candidate Search Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>All user-defined fields (UDF) marked as “Candidate Search” at the field property level.</td>
</tr>
<tr>
<td>Personal information:</td>
</tr>
<tr>
<td>• Accepts Job Posting Notifications</td>
</tr>
<tr>
<td>• Date of Birth</td>
</tr>
<tr>
<td>• Email Address (or User Name)</td>
</tr>
<tr>
<td>• Employee Number</td>
</tr>
<tr>
<td>• First Name</td>
</tr>
<tr>
<td>• Last Name</td>
</tr>
<tr>
<td>• Middle Name</td>
</tr>
<tr>
<td>• Place of Residence (RSLocation) - Note that using radius search around a zip code should be done when a zip code is required from candidates. If it is optional, many candidates might be discarded even if they are good candidates.</td>
</tr>
<tr>
<td>• Prefix</td>
</tr>
<tr>
<td>• Referred/Not Referred</td>
</tr>
<tr>
<td>• Social Security Number</td>
</tr>
<tr>
<td>• Work Phone Number</td>
</tr>
<tr>
<td>Basic profile from the profile:</td>
</tr>
<tr>
<td>• Advance Notice</td>
</tr>
<tr>
<td>• Date of Availability is</td>
</tr>
<tr>
<td>• Employee Status</td>
</tr>
<tr>
<td>Fields Available in the Advanced Candidate Search Page</td>
</tr>
<tr>
<td>--------------------------------------------------------</td>
</tr>
<tr>
<td>• Job Level</td>
</tr>
<tr>
<td>• Job Shift</td>
</tr>
<tr>
<td>• Job Type</td>
</tr>
<tr>
<td>• Schedule</td>
</tr>
<tr>
<td>• Travel</td>
</tr>
<tr>
<td>• Preferred Job</td>
</tr>
<tr>
<td>• Preferred Location</td>
</tr>
<tr>
<td>• Preferred Organization</td>
</tr>
<tr>
<td>• Shift Availability Grid</td>
</tr>
<tr>
<td>• Willing to work on holidays</td>
</tr>
<tr>
<td>• Willing to work on weekends</td>
</tr>
<tr>
<td>• Expected Hourly Pay Rate</td>
</tr>
<tr>
<td>• Hours per week willing to work</td>
</tr>
<tr>
<td>• Hours per week, preferred</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Education from the profile:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Institution</td>
</tr>
<tr>
<td>• Other Institution</td>
</tr>
<tr>
<td>• Program</td>
</tr>
<tr>
<td>• Other Program</td>
</tr>
<tr>
<td>• Education level (Achieved)</td>
</tr>
<tr>
<td>• Graduation date</td>
</tr>
<tr>
<td>• Start Date</td>
</tr>
<tr>
<td>• GPA (normalized value)</td>
</tr>
<tr>
<td>• Graduated</td>
</tr>
<tr>
<td>• Any searchable education user-defined field</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Experience from the profile:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Current Job</td>
</tr>
<tr>
<td>• Employer</td>
</tr>
<tr>
<td>• Other Employer</td>
</tr>
<tr>
<td>• Job Function</td>
</tr>
<tr>
<td>• Other Function</td>
</tr>
<tr>
<td>• Any searchable experience user-defined field</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Questionnaires:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Questions from library (no local questions from requisition)</td>
</tr>
<tr>
<td>• Skills</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Requisition Number/Title</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Sources and mediums from all submissions:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Application Medium</td>
</tr>
<tr>
<td>• Event ID</td>
</tr>
<tr>
<td>• Source Name</td>
</tr>
</tbody>
</table>
Fields Available in the Advanced Candidate Search Page

- Source Type

Certification:
- Certification
- Other Certification
- Location
- Certification ID
- Issuing Organization
- Issue Date is between
- Expiration Date is between

Candidate Advanced Search with Keywords

Keywords can be used when performing a Candidate Advanced Search.

In earlier releases, when users used the candidate advanced search's Keywords field, the system searched a large number of Candidate Profile fields as well as the five most recently attached files (three attached by candidates and two attached by users). Now, system administrators can configure a setting that will determine the fields that will be searched when using the Keywords field in the Advanced Candidate Search form. The setting can be set to Optimal (default value) or Legacy. The Legacy value should only be chosen to revert to original list of profile fields used prior to 13C – primarily to include "comments" in keyword search.

The table presents the fields searched by the candidate advanced search's Keywords field whether the setting is set to Optimal or Legacy.

<table>
<thead>
<tr>
<th>Fields searched when the setting is set to Optimal</th>
<th>Fields searched when the setting is set to Legacy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal information fields:</td>
<td>Personal information fields:</td>
</tr>
<tr>
<td>- first name</td>
<td>- first name</td>
</tr>
<tr>
<td>- last name</td>
<td>- last name</td>
</tr>
<tr>
<td>- middle initial</td>
<td>- middle initial</td>
</tr>
<tr>
<td>- employee number</td>
<td>- employee number</td>
</tr>
<tr>
<td>- street address</td>
<td>- street address</td>
</tr>
<tr>
<td>- city</td>
<td>- city</td>
</tr>
<tr>
<td>- phone numbers</td>
<td>- phone numbers</td>
</tr>
<tr>
<td>- email address</td>
<td>- email address</td>
</tr>
<tr>
<td>- postal code</td>
<td>- postal code</td>
</tr>
<tr>
<td>Text-based user-defined field answers.</td>
<td>Text-based user-defined field answers.</td>
</tr>
<tr>
<td>Pasted cover letter from the general profile.</td>
<td>Pasted cover letter from the general profile.</td>
</tr>
<tr>
<td>Pasted resume from the general profile.</td>
<td>Pasted resume from the general profile.</td>
</tr>
<tr>
<td>Career objectives from the general profile.</td>
<td>Career objectives from the general profile.</td>
</tr>
<tr>
<td>Additional information from the general profile.</td>
<td>Additional information from the general profile.</td>
</tr>
</tbody>
</table>
### Fields searched when the setting is set to Optimal

<table>
<thead>
<tr>
<th>All file attachments from the candidate provided the attachments have one of the following supported file formats:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• .doc, .docx (Word)</td>
</tr>
<tr>
<td>• .txt (standard text file)</td>
</tr>
<tr>
<td>• .rtf (rich text format)</td>
</tr>
<tr>
<td>• .pdf (Adobe Portable Document Format)</td>
</tr>
<tr>
<td>• .htm or .html (hypertext markup language documents)</td>
</tr>
<tr>
<td>• .wpd (Word Perfect)</td>
</tr>
<tr>
<td>• .odt (if Oracle 11G is used)</td>
</tr>
</tbody>
</table>

### Fields searched when the setting is set to Legacy

<table>
<thead>
<tr>
<th>The three most recent file attachments per candidate:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• .doc, .docx (Word)</td>
</tr>
<tr>
<td>• .txt (standard text file)</td>
</tr>
<tr>
<td>• .rtf (rich text format)</td>
</tr>
<tr>
<td>• .pdf (Adobe Portable Document Format)</td>
</tr>
<tr>
<td>• .htm or .html (hypertext markup language documents)</td>
</tr>
<tr>
<td>• .wpd (Word Perfect)</td>
</tr>
<tr>
<td>• .odt (if Oracle 11G is used)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>The two most recent file attachments per candidate:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• .doc, .docx (Word)</td>
</tr>
<tr>
<td>• .txt (standard text file)</td>
</tr>
<tr>
<td>• .rtf (rich text format)</td>
</tr>
<tr>
<td>• .pdf (Adobe Portable Document Format)</td>
</tr>
<tr>
<td>• .htm or .html (hypertext markup language documents)</td>
</tr>
<tr>
<td>• .wpd (Word Perfect)</td>
</tr>
<tr>
<td>• .odt (if Oracle 11G is used)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Education [Institution, Program, Other institution, Other Program and text-based user defined fields] from the general profile.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education (Other institution, Other Program and text-based user defined fields) from the general profile.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Work Experience (Employer, Job Function, Other Employer, Other Job Function, Achievements, and text-based user defined fields) from the general profile.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Experience (Other Employer, Other Job Function, Achievements, and text-based user defined fields) from the general profile.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Text-based answers to questions from the library.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text-based answers to questions from the library.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Comments (from the History tab).</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source and event names.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>User name.</th>
</tr>
</thead>
</table>

System administrators can also specify the types of attachments searched by the candidate advanced search’s Keywords field:

- all attachments
- candidates visible attachments
- attachments tagged as resumes

### Keywords and Boolean Operators

Keyword search is considered to provide exact matches. However, if a user includes OR in a search query, the search engine looks of course for exact matches for one word or the other. Boolean operators are pretty straightforward but when a complex search query using multiple Boolean operators is incorrectly formulated, results are unpredictable. The Keywords search supports the following boolean operators:

<table>
<thead>
<tr>
<th>Boolean Operator</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>AND</strong></td>
<td>By default, words entered in the Keywords field are linked (transparently) by the AND operator. If you searched for “product manager” (without the double quotation marks) or for “product and manager” (without the double quotation marks), the search results would be the</td>
</tr>
<tr>
<td>Boolean Operator</td>
<td>Description</td>
</tr>
<tr>
<td>------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>same. The search engine would retrieve all candidates whose file contains both words (the words will not necessarily be next to each other).</td>
<td></td>
</tr>
<tr>
<td>OR</td>
<td>You can use the OR operator to change the default behavior (AND) or to build more complex queries. For example, if you searched for “competitor1 OR competitor2 OR competitor3” (without the double quotation marks), the system will retrieve candidates whose file contains at least one of the competitors’ names.</td>
</tr>
<tr>
<td>NOT</td>
<td>You can use the NOT operator to exclude specific keywords from a query. For example, if you wanted to exclude from the search results candidates whose file contained the name of a specific company, but did refer to a specific competitor, you could search for “competitor1 NOT company1” (without the double quotation marks).</td>
</tr>
</tbody>
</table>
| Parentheses | Operations enclosed in parentheses are performed before other operations. For example, a search query for candidates who worked as marketing or advertising consultants could look like the following: (market* or advertis*) and (consult* or agent or representative). The search engine would retrieve candidate files that satisfy the two conditions:  
  • Candidate files containing a word that begins with market or advertis such as market, markets, marketing, advertise, advertising, advertisement  AND,  
  • Candidate files containing agent, representative, or a word beginning with consult such as agent, representative, consult, consultants, consulting, consulted, consultant. |
| Wild Card | The wild card “*” (asterisk) can be placed at the end of a word. For example, a search for comput* will retrieve all words that begin with comput such as computer, computing, computers, computation.  
  
  Wild cards within double quotation marks are not supported. |
| Double quotation marks around strings | You can use double quotation marks to search for a specific string. For example, if you wanted to find product managers but not product specialists who are also assistant managers, you could type “product manager” (with the double quotation marks).  
  
  You need to type the double quotes in the Keywords field; do not copy them from other applications such as Word and paste them into the field. Also note that double quotes can vary from one keyboard language to another. If you use a French keyboard and use these «quotes», the search engine does not recognize them as double quotes in the Keywords field. |

**Keywords and Stop Words**
Stop words are indexed in the Keywords field when doing an advanced candidate search. Stop words are small words not included in the index and excluded from a search because they are not considered to be significant. For example, words such as “no, not, the, one, and, or” and all single letters are stop words.

Stop words are considered by the system when placed within quotation marks or parenthesis. For example, when users are searching for “The GAP” placed within quotation marks or parenthesis, the system will consider the stop word "the". When users are searching for The GAP without quotation marks nor parenthesis, the system will ignore the stop word in the query.

**Keywords and Special Characters**

In general, special characters used as punctuation or separators are not included in the search index and cannot be used to retrieve information. This is the case for the following characters:

```
: ; , " ' - _ & *
```

Exception: When used in email and phone number fields, some special characters are supported. For example, john.smith@taleo.net is supported as is, because the system recognizes this is an email address.

**Keywords and Exact Term**

When you perform a Keywords search with Exact Term selected, words that match exactly the terms you entered are returned and highlighted. You can use the wild card *, quotation marks, parentheses, and Boolean operators (AND, OR, NOT) to construct sophisticated candidate search queries. The system applies the AND operator between words.

**Keywords and Related Terms**

The OR operator is applied transparently when the Related Term option is selected. The search engine searches for occurrences of the word you entered but also searches for occurrences of related terms determined by the system. Such related terms might be particularly relevant to your search while other related terms might be less pertinent.

You should use the Related Terms feature when your initial query did not retrieve a lot of candidates. The Related Term feature enables you to retrieve candidates whose file contains a word that is similar in meaning to your search word in addition to candidates whose file contains your exact search word. In addition to retrieving similar words, it retrieves words with the same first 6 letters, since those words are most likely in the same family. For example, if you search for “Administration” using related terms, the engine will also search for “administrative”, “administrator”, etc.

**Keywords and Conceptual Search**

The conceptual option for the advanced search is available if your system administrator has activated the proper setting.

The conceptual search is an extension of the related term search, where instead of finding variations of entered words, the system automatically finds the right concepts to search for based on the text provided and then broaden its search. The conceptual search allows you to use large blocks of text (typically from a candidate's resume or a job description) to search for candidates. Conceptual search is typically the best tool to use when searching for candidates with attached files. This tool can be used when you are viewing a relatively large amount of text regarding particular sections of a candidate's resume such as experience and education, or a job description and you want to know if there are other candidates whose records contain similar information. For details, see *Conceptual Search*.

**Keywords and Highlighting**
Keyword highlighting is activated by your system administrator and is limited to Advanced Search results. Each occurrence of the keyword is highlighted in yellow on all tabs in the candidate file and in the attached files. Up to fifty different terms can be highlighted. A private setting is used to limit the number of highlighted words (contact Oracle Support for details). The search will highlight words together when the search keyword includes double quotes, to better match what is really retrieved by the search engine. For example, searching for "product manager" displays only candidates with "product manager" in their file. Note that words are highlighted throughout the entire candidate file, even the labels, so some of the highlighted words are not used to retrieve the candidates.

When performing a candidate advanced search with the Keywords field, an entire word or 3 characters with a wild card (*) can be used as a keyword.

Conceptual Search

Conceptual Search is an alternative way to search candidate files that broadens the search result by including documents that are similar based on concepts and proximities. The retrieved documents do not need to contain everything entered as search criteria, only related concepts.

In a Conceptual Search, most of the structured data elements are not part of the candidate file and are leveraged by the Advanced Search engine. Although Conceptual Search might be the preferred search method of some users, the Conceptual Search engine was built to complement the Advanced Search. Advanced Search can retrieve candidate files with more precision, using mandatory criteria used to source candidates for a specific requisition and can clearly define the required criteria set for a specific job. But what if you don’t have precise criteria for a search? What if you have candidates without structured data and who have simply a pasted resume or an attached file? Or perhaps you cannot find any candidates using the Advanced Search and want to know what your database holds with regard to a hard-to-fill job description or candidates used as a basis to find other candidates. These are scenarios for which the Conceptual Search is most suitable.

Once the Conceptual Search module is enabled, the system administrator can control which users will have access to Conceptual Search by granting them a user type permission.

The Conceptual Search is available via the Advanced Search. When selecting the Conceptual option, users must enter significant text in the Keywords field (typically taken from a candidate's resume or a job description) to search for candidates. The search engine then looks through the following content of the candidate file:

<table>
<thead>
<tr>
<th>Content Searched by the Conceptual Search</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pasted resume from the general profile.</td>
</tr>
<tr>
<td>Career objectives from the general profile.</td>
</tr>
<tr>
<td>Additional information from the general profile.</td>
</tr>
<tr>
<td>Education (Other Institution, Other Program, Education Level (Achieved), and text-based User Defined Fields) from the general profile.</td>
</tr>
<tr>
<td>Work Experience (Other Employer, Other Job Function, Achievements, and text-based User Defined Fields) from the general profile.</td>
</tr>
<tr>
<td>Text-based answers to questions from the library.</td>
</tr>
<tr>
<td>Text-based user-defined field answers.</td>
</tr>
<tr>
<td>The last three attachments per candidate provided the attachments use one of the following supported file formats:</td>
</tr>
</tbody>
</table>
On top of that, users can increase the Conceptual Search with any specific search criteria made available to them. This provides the possibility to mine the database on various concepts to find interesting candidates, but also restricts the result with more precise criteria, which was not available before.

The conceptual search cannot retrieve disqualified candidates because they are not indexed in the database.

Below are a few tips when using Conceptual Search.

**Tip 1: Provide enough text in the Keywords field**

If you only need to type a few words, it is usually advisable to perform a Keyword search or Related Terms search instead of a Conceptual Search. The Conceptual Search analyzes a text, extracts the most significant elements and compares them with significant words and relationships between words extracted from a sample of about 100,000 candidate files from your database. The system discards non-significant words from its reference list in the knowledge base. A word used by only a few candidates or another used by almost all candidates might not have any weight in the Conceptual Search “brain”. For example, if you searched for the word “consultant” in a consultant database, then the word would occur so many times that it might not even share any concept with other words. The search engine would perform a search using the exact word “consultant” and most or all of the candidates would have this criterion.

If you performed a Conceptual Search using only a few words, chances are that some of the words would be non-significant. You would better off pasting entire paragraphs and let the system determine what is important in each one and identify the best candidates based on this information.

**Tip 2: Sort results by decreasing relevancy**

The Conceptual Search engine tends to retrieve a lot of candidates. What distinguishes them is the relevancy between the candidate file and the Conceptual text box. You will typically want to sort the retrieved candidates from most relevant to least relevant.

### Configuring the Conceptual Search

The configuration of the conceptual search consists of the following steps.

1. **Enabling the Conceptual Search Activation setting.**
2. **Enabling the Advanced Search Links setting.**
3. **Granting the candidate advanced search permission.**
4. **Granting the conceptual search permission.**
5. **Creating a list format for advanced search results.** You can also use the default list format or modify it.
6. **Assigning a list format variation to configuration profiles.**
Enabling the Conceptual Search Setting

Prerequisite

Configuration > [Recruiting] Administration > Settings

Steps
1. Locate the Conceptual Search Activation setting using the Refine by feature.
2. Click the Conceptual Search Activation setting.
3. Click Edit.
4. Select the Yes value.
5. Click Save.

Enabling the Advanced Search Links Setting

Prerequisite

Configuration > [SmartOrg] Administration > [Users] Configuration Profiles

Steps
1. Click a configuration profile.
2. Locate the Advanced Search Links setting using the Refine by feature.
3. Click the Advanced Search Links setting.
4. Click Edit.
5. Select the Yes value.
6. Click Save.

Granting the Candidate Advanced Search Permission

Prerequisite

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

Steps
1. Click a user type.
2. Click the Recruiting functional domain.
3. Click Edit next to Search.
4. Select the Access advanced search permission.
5. Click Save.

Granting the Conceptual Search Permission

Prerequisite

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

Steps
1. Click a user type.
2. Click the Recruiting functional domain.
3. Click Edit next to Search.
4. Select the Access conceptual search option of the advanced search permission.
5. Click Save.

Assigning a List Format Variation to Configuration Profiles

**Prerequisite**

*Configuration > [SmartOrg] Administration > [Users] Configuration Profiles*

**Steps**

1. Click a configuration profile.
2. Click the Candidate List Format setting.
3. Click Edit.
4. Select a list format variation in the Value drop-down list.
5. Click Save.
6. Click the Requisition List Format setting.
7. Click Edit.
8. Select a list format variation in the Value drop-down list.
9. Click Save.
10. Go back to the SmartOrg Configuration menu.
11. Click User Accounts.
12. Click a user account.
13. Click Edit next to Account Information.
14. Select a configuration profile.
15. Click Save.

Creating a List Format for Advanced Search Results

**Prerequisite**

*Configuration > [Recruiting] Administration > List Formats*

**Steps**

1. Click the Candidate tab.
2. Select a variation in the Show list.
3. Click the Search Results / Advanced Search list format context.
4. In the Context Details page, under the Formats for this Context tab, click New...
5. Provide a name for the list format.
6. Translate the name of the list format using the Languages list located on the top right hand side of the page.
7. Optional: Enter comments.
8. Optional: You can specify if the list format you are creating will be the default list format for the context.
9. Choose the desired columns by selecting the check box next to each column name.
10. Order columns in the list format by selecting a number in the Sequence Number column then click Reorder.
11. Sort files in the list according to a specific criterion. Up to three different sorting criteria can be specified.
   a) To select a criterion, click ▲ in the Sort By column next to the desired column name.
   b) To select a second sorting criterion, click ▲ in the Then by column next to the desired column name.
   c) To select a third sorting criterion, click ▲ in the second Then by column next to the desired column name.
   d) To select ascending or descending sorting order, click ▲ repeatedly.

12. Optional: You can select the Group records by first sort criterion option if you want to group files in the list format.
13. Click the Active check box to activate the list format.
14. Click Done.

**Result**

The list format appears in the Context Details page, under the Formats for this Context tab.

**Conceptual Search - Permissions and Settings**

The following permissions and settings are used to configure the conceptual search.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access advanced search</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Search</td>
</tr>
<tr>
<td>Access conceptual search option of the advanced search</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Search</td>
</tr>
<tr>
<td>Other search permissions are available in the Search functional domain.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Search</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conceptual Search Activation</td>
<td>Activates the conceptual search functionalities.</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Other settings related to the Advanced Search are available under Recruiting settings. You can also refer to the Advanced Search - Permissions and Settings table.</td>
<td></td>
<td></td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
</tbody>
</table>

**General Profile Search**

It is possible to return search results of candidates who have only submitted a general profile but have not yet applied on any specific requisition.

When this feature is enabled, users may add the “Exclude candidates who applied on requisitions” search criteria in the advanced search form and decide to search only for candidates who have submitted a general profile.
but have not yet applied for a specific position. This feature helps to ensure candidates who do not apply for a specific job are also considered.

**Configuring the General Profile Search**

The configuration of the general profile search consists of the following steps.

1. **Adding the "Exclude candidates who applied on requisitions" field in the advanced search form.**
2. **Enabling the Advanced Search Links setting.**
3. **Granting the candidate advanced search permission.**

**Adding the "Exclude candidates who applied on requisitions" Field in the Advanced Search Form**

**Prerequisite**

This is a prerequisite for this task.

**Configuration > [Recruiting] Administration > Advanced Search Page**

**Steps**

1. In the Field Group, select Basic Profile.
2. In the Available Fields, select Exclude candidates who applied on requisitions.
   - Click Add.
3. Click Save.

**Granting the Candidate Advanced Search Permission**

**Prerequisite**

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

**Steps**

1. Click a user type.
2. Click the Recruiting functional domain.
3. Click Edit next to Search.
4. Select the Access advanced search permission.
5. Click Save.

**Enabling the Advanced Search Links Setting**

**Prerequisite**

**Configuration > [SmartOrg] Administration > [Users] Configuration Profiles**

**Steps**

1. Click a configuration profile.
2. Locate the Advanced Search Links setting using the Refine by feature.
3. Click the Advanced Search Links setting.
4. Click Edit.
5. Select the Yes value.
6. Click Save.

**Similar Candidate Search**

Recruiting Center users have the ability to look for similar candidates based on information of an existing candidate.

This type of search (often referred to as “more like this” search) can be performed from a candidate list or from within a candidate file by using the icon.

The “find similar candidates” search uses the candidate file, which includes the fields used in the Conceptual Search, as the search criteria.

In addition to this information, the system uses default values for the Last Update and all the underlying search parameters applied in the Conceptual Search. The candidate’s location is ignored because the system cannot assume you want to search for the current candidate location. You can, however, direct the “find similar candidates” search in your preferences to use your default search location. The 2,500 character limitation that applies to the Conceptual Search does not apply to the “find similar candidates” search. The Last Update value and Place of Residence (location) are user preferences that can be defined in My Setup.

Note that performing a “find similar candidates” search using a candidate file that contains no information in any of the list of fields used in the Conceptual Search retrieves no candidates and even displays a message informing the end user that the selected candidate cannot return any candidate. A candidate selected as a reference for a Conceptual Search must have significant text information, like an attached resume or a plain text pasted resume.

The “find similar candidates” search can be performed for one candidate file at a time.

The “find similar candidates” is available for all types of job submissions, including hourly candidate job submissions.

**Configuring the Similar Candidate Search**

When the conceptual search is enabled and configured, the similar candidate search becomes automatically available to Recruiting Center users.

For details, see *Configuring the Conceptual Search*.

**Randomized Search Result**

The randomized search result feature allows Recruiting Center users to specify that the information contained in the advanced search result list be returned in random order.

The randomized search results feature supports requirements from the Office of Federal Contract Compliance Programs (OFCCP) and is usually activated only for customers located in the United Stated through protected settings. Randomized search means that candidates displayed in the advanced search result list are picked randomly in the overall list of candidates matching search criteria. An advanced candidate search done with randomization will return a list of 300 candidates or less, but instead of displaying the first 300 candidates, it will display any 300 of the matching candidates, with no predetermined priority, and will sort them based according to the sorting criterion set for the list. Any candidate matching the search criteria can be returned.

In the Recruiting Center, the Random results option is disabled when users perform a Conceptual Search. In previous releases, when the Random results option was selected in the Advanced Candidate Search page and the number of matches was higher than the limit of returned results, the system returned a random set of results from the matching set (and the resulting set was sorted by relevancy). This is not an issue when search criteria are
specific and the result set is small. However, when performing a Conceptual Search or a very broad search (using related terms, for example), the result set might be quite large and the Random results option might provide poor quality results:

- When performing a conceptual search, the Random results option is turned off.
- When using the "find candidates matching a job requisition" feature (available in the requisition file via the icon) or the "find similar candidates" feature (available in the candidate file via the icon), the Random results option is turned off.

The Random results option continues to be available for both the Exact term and Related Terms keyword search. For customers who have the Search Randomize Enabled setting set to Yes, the Random results option will be selected by default for both the Exact term and Related Terms keyword search. In these types of search, if the number of matches is higher than the limit of returned results, the system will return a random set of results from the matching set.

Conceptual Search analyzes a relatively large amount of text when performing a broad match against the candidate database. As such, this type of search is used to discover hard-to-find candidates and is not a tool to exclude candidates. The search results from a Conceptual Search only make sense when they are ranked in order of relevancy and as such is incompatible with the Random results option.

### Enabling Randomized Search Result

**Prerequisite**

*Configuration > [Recruiting] Settings*

**Steps**

Contact Oracle Support to have the *Search Randomize Enabled* protected setting enabled.

### Search Result Archiving

The search result archiving feature allows Recruiting Center users to select the requisition for which they want to archive search criteria and results.

The search result archiving feature supports requirements from the Office of Federal Contract Compliance Programs (OFCCP) and is usually activated only for customers located in the United Stated through protected settings. When performing an advanced search, search criteria and/or results are archived in the database. The information is kept in the database for two years for audit purposes and prevents candidates from hard deletion.

When the feature is activated, all search results, even those done for requisitions outside the US will be archived.

### Enabling Search Results Archiving

**Prerequisite**

*Configuration > [Recruiting] Settings*

**Steps**

Contact Oracle Support to have the *OFCCP Search Trace Activation* and the *OFCCP Search Trace Candidate IDs Activation* protected settings enabled.
Exclusion of Agency Owned Candidates in Search Results

Agency owned candidates can be excluded from candidate search results.

When this feature is enabled, users may add the “Exclude candidates owned by agencies” search criteria in the advanced search form and decide to include or not agency owned candidates in search results.

Adding the "Exclude candidates owned by agencies" Field in the Advanced Search Form

**Prerequisite**
This is a prerequisite for this task.

**Configuration** > [Recruiting] Administration > Advanced Search Page

**Steps**
1. In the Field Group, select Basic Profile.
2. In the Available Fields, select Exclude candidates owned by agencies.
   - Click Add.
3. Click Save.

Excluding Candidates with Specific Statuses from Search Results

**Prerequisite**

**Configuration** > [Recruiting] Settings

**Steps**
1. Open the *Threshold CSW Step - Hide from Search* setting.
2. Select a threshold step in the Value field.
3. Click Save.

**Result**
The above setting works in conjunction with the *Allow users to view candidates that are being considered in other active requisitions* user type permission. If the candidate has reached the selected status, the candidate will no longer be displayed in the search results, based on the permission of the user type.

**Next Step**
Grant the *Allow users to view candidates that are being considered in other active requisitions* user type permission.

Why Advanced Search is Filtering Candidates on Your Behalf

Certain elements could have an impact on advanced search results.

**Data segmentation**: If your organization has activated data segmentation, this might exclude a lot of candidates from your search results. For this reason, it is important to verify if your organization has implemented such restrictions and, if this is the case, ask how they affect which candidates you are entitled to view. There are two dimensions to data segmentation: a user type permission whereby the candidates displayed to a user is
determined by the person’s staffing type; and the Organization, Location and Job Field (OLF) associated with groups that the user is a member of. While it might be easy to manage only a few groups around specific organizations, the effect of segmentation can be difficult to clearly understand if users are associated with multiple groups incorporating various OLF. Ask your system administrator if he/she has activated the Activate Segmentation in Search setting.

Incomplete submissions: Many candidates never complete their submissions for various reasons. An incomplete general profile will not be retrieved during a search if your organization has configured the system that way. Note that in average, 33% of candidates might not have completed a job specific submission or a general profile. An interesting alternative to not displaying such candidates is to display them and add an Incomplete Submission column.

Remember that the “incomplete submission” flag refers to the online submission process, not to the completeness of the candidate file overall. If your organization does not display incomplete submissions, incomplete submissions that might contain a lot of information are obviously not displayed. On the other hand, you might have partial submissions, that were captured or imported, and those partial submissions have the “complete” flag, even if only few fields were captured. Thus, incomplete submission refers to online submissions or online profiles that have not passed the submission page, regardless of whether all the content has been provided or not. Ask your system administrator if he/she has activated the Display Incomplete Application setting.

Identification missing: “Identification missing” candidate files are missing a candidate’s first and last name and do not have the official “anonymous” flag. Ask your system administrator if he/she has activated the Display Identification Missing Candidates setting.

Excluding candidates in selection process: Candidates who are in a selection process associated with an open requisition can be excluded from search results. Ask your system administrator if he/she has activated the Candidate Search Mask Processed setting.

Excluding candidates in selection process who have attained or proceeded beyond a specific status: The Threshold CSW Step - Hide from Search setting works in tandem with the Allow users to view candidates that are being considered in other active requisitions user type permission to prevent competitive recruiting. This setting sets the status from which the system is to stop showing candidates. The setting indicates the CSW reference model step at which, once reached, candidates will be excluded from search results (unless the user type has overriding permission). Candidates are excluded from search results once they have reached the threshold step or when they are at a step that comes after the threshold step in the reference model sequence. Ask your system administrator if he/she has activated that setting and user permission.

Matching the place of residence: By default, when a user searches for candidates associated with a specific place of residence, the system retrieves candidates associated with a “higher” location in addition to the specific location (place of residence). It is recommended that you include “higher” levels (country and state/province) because even if in theory candidates do have all levels (down to region), some might not. Exceptions are:

- If the place of residence field is not mandatory (usually only optional in capture candidate or through import).
- If it is a new country. Taleo place of residence locations, which are centrally managed, increase in number as customers request that specific new countries be included. Taleo had numerous countries without states or regions in the past and started to add into the database such countries’ regions on a customer-by-customer basis. Some candidates never had the opportunity to select a 2nd or 3rd level so it is important that they are not excluded by default when a search is performed.

The number of exceptions should be less than the number of candidates with an exact match and Taleo feels it is fair to retrieve those candidates who never had the opportunity to indicate their structured place of residence. Some Taleo customers might want to change this setting however.
Requisition Search

The requisition search allows Recruiting Center users to quickly find specific requisitions.

The requisition search tool is available at the top right hand corner of the Recruiting Center pages. It is available to users if it has been configured in the user's configuration profile and if the user type permission has been granted.

When performing a requisition search, users enter the title, the number, or a keyword to find the desired requisition. A wild card search may also be used. The search engine only returns results appropriate to the user's permissions and group association.

When performing a requisition search using a keyword, the search engine looks through this content of the requisition file:

- Requisition number
- Requisition title
- Requisition title by manager
- Requisition internal description
- Requisition external description
- Job board summary description
- Internal qualifications
- External qualifications
- Abstract
- Additional information
- Department
- Position
- Requisition UDF
- Offer UDF
- Department UDF
- Requisition Primary Location
- Requisition standard fields (Hire Type, State, Job Schedule, Job Level, Job Shift, Job Type, Study Level, Will Travel, Employee Status)

When performing a requisition search using a keyword, stop words are indexed. Stop words are small words not included in the index and excluded from a search because they are not considered to be significant. For example, words such as “no, not, the, one, and, or” and all single letters are stop words. Stop words are considered by the system when placed within quotation marks or parenthesis. For example, when users are searching for "The GAP" placed within quotation marks or parenthesis, the system will consider the stop word "the". When users are searching for The GAP without quotation marks nor parenthesis, the system will ignore the stop word in the query.

For the requisition search, the system automatically applies the boolean operator AND. The AND, OR, and NOT operators can be entered manually.
The search is not case sensitive.
For performance and management reasons, a maximum of 300 matching files are displayed.

Configuring the Requisition Quick Search

The configuration of the requisition quick search consists of the following steps.

1. *Enabling the Search Widget setting.*
2. *Granting the requisition search permission.*
3. *Creating a list format for search results.* You can also use the default list format or modify it.
4. *Assigning a list format variation to configuration profiles.*

Enabling the Search Widget Setting

**Prerequisite**

*Configuration > [SmartOrg] Administration > [Users] Configuration Profiles*

**Steps**

1. Click a configuration profile.
2. Locate the Search Widget setting using the Refine by feature.
3. Click the Search Widget setting.
4. Click Edit.
5. Select the Yes value.
6. Click Save.

Granting the Requisition Search Permission

**Prerequisite**

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

**Steps**

1. Click a user type.
2. Click the Recruiting functional domain.
3. Click Edit next to Search.
4. Select the Access requisition search permission.
5. Click Save.

Creating a List Format for Quick Search Results

**Prerequisite**

*Configuration > [Recruiting] Administration > List Formats*

**Steps**

1. Click on the Candidate tab.
2. Select a variation in the Show list.
3. Click the Search Results / Quick Search list format context.
4. In the Context Details page, under the Formats for this Context tab, click New...
5. Provide a name for the list format.
6. Translate the name of the list format using the Languages list located on the top right hand side of the page.
7. Optional: Enter comments.
8. Optional: You can specify if the list format you are creating will be the default list format for the context.
9. Choose the desired columns by selecting the check box next to each column name.
10. Order columns in the list format by selecting a number in the Sequence Number column then click Reorder.
11. Sort files in the list according to a specific criterion. Up to three different sorting criteria can be specified.
   a) To select a criterion, click ▲ in the Sort By column next to the desired column name.
   b) To select a second sorting criterion, click ▲ in the Then by column next to the desired column name.
   c) To select a third sorting criterion, click ▲ in the second Then by column next to the desired column name.
   d) To select ascending or descending sorting order, click ▲ repeatedly.
12. Optional: You can select the Group records by first sort criterion option if you want to group files in the list format.
13. Click the Active check box to activate the list format.
14. Click Done.

**Result**
The list format appears in the Context Details page, under the Formats for this Context tab.

### Assigning the List Format to a Configuration Profile and User Account

**Prerequisite**

- Configuration > [SmartOrg] Administration > Configuration Profiles

**Steps**

1. Click on a configuration profile.
2. Click on the Requisition List Format or the Candidate List Format setting.
3. Click Edit.
4. Select a variation.
5. Click Save.
6. Go back to the SmartOrg Administration menu.
7. Click User Accounts.
8. Click on a user account.
9. Click Edit next to Account Information.
10. Select a configuration profile.
11. Click Save.
Search Queries

Search Query

A search query is an advanced candidate search that has been saved in order to be used repetitively and potentially shared with other Recruiting Center users.

A search query is a set of search criteria selected by a Recruiting Center user to perform an advanced candidate search. Each time an advanced search is performed, a search query can be created. A search query can be used as a basis for future searches and can be changed to narrow or broaden search results when needed.

The search query feature is available at the top right hand corner of the Recruiting Center pages.

Users can save a search query if the feature is activated in the user’s configuration profile and if the user type permission has been granted. The fields that can be selected in the Recruiting Center to customize a search query are set by the system administrator for each configuration profile. If a user is not linked to a configuration profile or is linked to a configuration profile for which the system administrator has not selected additional fields, then only the set of default fields are displayed when customizing a search query in the Recruiting Center.

Two types of queries can be created:

- Personal search queries will remain available only to the user that created the query.
- Shared search queries are queries that are made available to selected users.

Search queries can be saved in folders. For details, see [Folder].

Configuring the Search Query Feature

The configuration of the search query feature consists of the following steps.

1. **Enabling the Search Query setting.**
2. **Enabling the Advanced Search Links setting.**
3. **Granting the candidate advanced search permission.**

Enabling the Search Query Setting

**Prerequisite**

*Configuration > [SmartOrg] Administration > [Users] Configuration Profiles*

**Steps**

1. Click a configuration profile.
2. Locate the Advanced Search “Save Query” button setting using the Refine by feature.
3. Click the Advanced Search “Save Query” button setting.
4. Click Edit.
5. Select the Yes value.
6. Click Save.

**Result**

The Save Query button is displayed to Recruiting Center users when creating an advanced search.

**Enabling the Advanced Search Links Setting**

**Prerequisite**

*Configuration > [SmartOrg] Administration > [Users] Configuration Profiles*

**Steps**

1. Click a configuration profile.
2. Locate the Advanced Search Links setting using the Refine by feature.
3. Click the Advanced Search Links setting.
4. Click Edit.
5. Select the Yes value.
6. Click Save.

**Granting the Candidate Advanced Search Permission**

**Prerequisite**

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

**Steps**

1. Click a user type.
2. Click the Recruiting functional domain.
3. Click Edit next to Search.
4. Select the Access advanced search permission.
5. Click Save.
Data Segmentation

Data Segmentation

Data segmentation is the ability to limit candidates retrieved in the search results based on predefined Organization-Location-Job Field associated with the search domain.

Data segmentation is used to identify which Recruiting Center users are authorized to view candidates according to corporate guidelines or potentially country guidelines for data privacy and sharing. With this feature, not all candidates will be visible to all users.

To enable data segmentation, system administrators must do the following:

<table>
<thead>
<tr>
<th>What to do</th>
<th>Where to do it</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable the <em>Activate Segmentation in Search</em> setting.</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Create a user group and define a coverage area (that is, select the</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Groups</td>
</tr>
<tr>
<td>Search functional domain and associate the group to Organizations,</td>
<td></td>
</tr>
<tr>
<td>Locations or Job Fields).</td>
<td></td>
</tr>
<tr>
<td>Add users to the user group.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Groups</td>
</tr>
<tr>
<td>Define requisition type access for users (that is, define access to</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt;</td>
</tr>
<tr>
<td>professional, hourly, campus, contingent, and executive requisitions).</td>
<td>Requisitions &gt; Requisition Types</td>
</tr>
</tbody>
</table>

Example 1:

A system administrator needs to set up a Recruiting team such that they can only search and retrieve candidates who have expressed an interest in working anywhere in Europe, as kept in their location preferences. The system administrator will have to do the following:

- Enable the *Activate Segmentation in Search* setting.
- Create the user group "Recruiting – Europe".
- Assign at least one coverage area to the user group:
  - Domain = Recruiting > Search.
  - Locations = Austria, Belgium, Bulgaria, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, United Kingdom (that is, all countries in Europe).
- Add users to the "Recruiting – Europe" user group.
- Define requisition type access for users.

Alternatively, system administrators can create personal coverage areas with the search domain at the user level instead of using a group with such coverage area. As a result, while searching candidates using the candidate advanced search, quick search or specific search as well as the view candidates under the job posting notification feature, such users will only be able to retrieve candidates having selected at least one of the listed European countries. Note that candidates without any preference can be retrieved.

Example 2:

An organization wants to segment candidate general profiles by user group. The organization has eight different companies sharing one zone. Each company has its own career section and the company’s recruiters are setup in
a user group contextualized by Organization. The companies do not want to share candidate general profiles that come in through their own specific career section. Data segmentation is driven by the employment preferences created automatically while applying on a job or collected in the general profile application flow. The system administrator will have to do the following:

• If profile only submission is allowed, make sure the Employment Preferences block is included in the Candidate Profile application flow (Configuration > [Career Section] Administration > Application Flows).
• Enable the Activate Segmentation in Search setting.
• Create a user group contextualized by Organization and make sure the Recruiting - Search domain is associated with such organization.
• Add users to the user group.

When the candidate completes the Employment Preferences block on the career section, the Organization that the candidate selects drives the data segmentation of the candidate general profile by user group. When a recruiter from a user group runs a search on a candidate that has selected an Organization outside of their user group, a recruiter with one or many search domains will be limited to candidates who had selected at least one of the search domain organization available. A candidate who had selected an organization outside of the recruiter group will not be visible if the recruiter's organization(s) is not selected.
Candidate and Requisition Matching

• Matching Candidates and Requisitions.................................................................286
Matching Candidates and Requisitions

There are three contexts where candidates and requisitions can be automatically matched.

Matching candidates when posting a requisition: When posting a requisition to an external career section, Recruiting Center users can view candidates who were found to match the requisition they are posting. This feature is available via the Preview Matching Candidates button. This matching is based on matching candidate criteria you have set. When configuring this feature, you have the ability also set an option to send an email to candidates who match the selected requisition. Candidates who have all the Required criteria will receive an email inviting them to apply on the job that is posted (Job Posting Notification). There are also default filters available for matching candidates. Configuring these filters will help the user narrow down or widen the list of matching candidates.

Matching candidates while viewing their candidate file: This is known as a reverse search since Recruiting Center users start with the candidate file and then work back to matching requisitions. This can be helpful when there are two top candidates for a position and one is hired; users can use a reverse search to find another open requisition for the candidate who was not hired. This feature is available via the icon. The matching requisitions criteria lets you select criteria that will guide the system on how to match candidates to requisitions.

In a career section, candidates can access jobs that match their preferences: Candidates who have completed a job-specific submission or a general profile can access jobs that match the preferences they have set in their general profile. Jobs that match display on the Personalized Job List. The configuration of the Personalized Job List is done in the Career Section Administration menu. For details, refer to the Career Section Configuration Guide.

Matching Candidates when Posting a Requisition

The configuration of this feature consists of the following steps.

1. Setting matching candidate criteria.
2. Setting matching candidate filters.
4. Activating the matching candidate email notification.

Setting Matching Candidate Criteria

Prerequisite

Configuration > [Recruiting] Administration > Matching Candidate Criteria

Steps

1. In the Matching Criteria — Job Posting Notification page, select matching criteria and specify if they are required or desired.
2. Click Save.

Setting Matching Candidate Filters

Prerequisite

Configuration > [Recruiting] Administration > Matching Candidate Filters
Steps
1. In the Default Filters for Matching Candidates page, select matching candidate filters.
2. Click Save.

Specifying Preview Filters
Prerequisite
Configuration > [Recruiting] Administration > Matching Candidate Preview
Steps
1. In the Preview Matching Candidates page, select a country in the Available Countries list.
   Having no selection in the Selected Countries list disables the Preview Matching Candidates button in the requisition file.
2. Click Add.
3. Click Save.
Result
If a requisition’s location corresponds to the country you selected, the Preview Matching Candidates button will be available in the requisition Posting and Sourcing tab. This feature is useful if a company may not feel comfortable in showing to users a list of matching candidates for job posted in some countries because of regulation reasons (EEO regulations for example).

Activating the Matching Candidate Email Notification
Prerequisite
Configuration > [Recruiting] Settings
Steps
1. Locate the Email Job Matching Candidates Default setting.
2. Click Edit.
3. Select Yes.
4. Click Save.
Result
In the requisition file, the option E-mail this job posting to matching candidates is selected by default. An email will be automatically sent to candidates that match a requisition requirements.

Matching Candidates while Viewing their Candidate File
The configuration of this feature consists of the following steps.
Additional text if needed (optional)
1. Setting matching requisition criteria.

Setting Matching Requisition Criteria
Prerequisite
Configuration > [Recruiting] Administration > Matching Requisition Criteria
Steps

1. In the Matching Criteria - Match Candidate page, select *matching requisition criteria* and specify if they are required or desired.
2. Click Save.

Matching Candidates and Requisitions - Permissions and Settings

The following permissions and settings are used for the matching candidates and requisition functionality.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Match candidates to requisitions</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Search</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Job Matching Candidates</td>
<td>By default, check the &quot;Email this job posting to matching candidates&quot; check box. See <em>Job Posting Notification</em>.</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Default</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Matching Candidate Criteria

The table presents criteria used for matching candidates when posting a requisition.

<table>
<thead>
<tr>
<th>Recruiting Administration &gt; Matching Candidate Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preferred Jobs/Job</td>
</tr>
<tr>
<td>Preferred Locations/Locations</td>
</tr>
<tr>
<td>Preferred Organizations/Organization</td>
</tr>
<tr>
<td>Place of residence/Location</td>
</tr>
<tr>
<td>Competencies</td>
</tr>
<tr>
<td>Questions</td>
</tr>
<tr>
<td>Job Level</td>
</tr>
<tr>
<td>Job Type</td>
</tr>
<tr>
<td>Schedule</td>
</tr>
<tr>
<td>Shift</td>
</tr>
<tr>
<td>Employee Status</td>
</tr>
<tr>
<td>Education Level</td>
</tr>
<tr>
<td>Travel</td>
</tr>
<tr>
<td>Minimum Annual Salary</td>
</tr>
</tbody>
</table>
Matching candidate criteria are set by system administrators. However, they can be modified by Recruiting Center users to find more relevant requisitions for a particular candidate.

Matching criteria (except for competencies and questions) can be set as desired or required:

- **Required**: The criterion is mandatory. A match must exist between the content of the candidate file and of the requisition file. If a requisition file meets the criterion, it will appear in the list of requisitions presented to the user.
- **Desired**: The criterion is an asset. A match is not required between the content of the candidate file and of the requisition file. Desired criteria are considered as a plus. A requisition file that does not match a desired criterion is not rejected.

Requisition files that meet all the required criteria and that also meet some desired criteria will appear at the top of the requisitions list presented to the user. Competencies and questions criteria are considered as wildcards. If these criteria are not selected as required in the requisition, or if a candidate does not enter answers for these criteria, the answers will still be considered.

### Matching Candidate Filters

The table presents filters used to control the number of candidates displayed to users when viewing a list of candidates matching a requisition.

<table>
<thead>
<tr>
<th>Recruiting Administration &gt; Matching Candidate Filters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invite internal candidates.</td>
</tr>
<tr>
<td>Invite candidates living in: all countries, the requisition country, the requisition state/province or the requisition region.</td>
</tr>
<tr>
<td>Invite only candidates whose information has been modified during the last x month.</td>
</tr>
<tr>
<td>Do not invite candidates who have an incomplete profile that has not been modified during the last x month.</td>
</tr>
<tr>
<td>Do not invite candidates who have at least one application with any of the selected statuses: New, Reviewed, 1st, 2nd, 3rd interview, Testing, Offer, Hired, Rejected, Decline, Inactive.</td>
</tr>
<tr>
<td>Invite candidates who have applied at least once through any of the following source types or sources:</td>
</tr>
</tbody>
</table>

Matching candidate filters are set by system administrators. However, they can be modified by Recruiting Center users.

### Matching Requisition Criteria

The table presents criteria used when matching candidates while viewing their candidate file (reverse search).

<table>
<thead>
<tr>
<th>Recruiting Administration &gt; Matching Requisition Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preferred Jobs/Job</td>
</tr>
<tr>
<td>Preferred Locations/Locations</td>
</tr>
<tr>
<td>Preferred Organizations/Organization</td>
</tr>
<tr>
<td>Place of residence/Location</td>
</tr>
<tr>
<td>Competencies</td>
</tr>
</tbody>
</table>

Matching candidate filters are set by system administrators. However, they can be modified by Recruiting Center users.
Matching criteria (except for competencies and questions) can be set as desired or required:

- **Required**: The criterion is mandatory. A match must exist between the content of the candidate file and of the requisition file. If a requisition file meets the criterion, it will appear in the list of requisitions presented to the user.

- **Desired**: The criterion is an asset. A match is not required between the content of the candidate file and of the requisition file. Desired criteria are considered as a plus. A requisition file that does not match a desired criterion is not rejected.

Requisition files that meet all the required criteria and that also meet some desired criteria will appear at the top of the requisitions list presented to the user.

Competencies and questions criteria are considered as wildcards. If these criteria are not selected as required in the requisition, or if a candidate does not enter answers for these criteria, the answers will still be considered.
Approvals

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Approvals

Standard Approval versus Dynamic Approval Routing

When requesting an approval, Recruiting Center users must choose from a list the name of the users who will be required to do the approval. The list of approvers can be configured or not by the system administrator depending on the type of approval chosen by an organization.

• If the standard approval process is used within an organization, the user will select approvers from a list containing all of the active users of the database. The user will also be able to create a list of frequent approvers in the My Setup feature.
• If the Dynamic Approval Routing process is used within an organization, the list of approvers will be pre-populated upon selecting the Request Approval action. The list of approvers to be generated is configured by the system administrator within the Dynamic Approval Routing feature. These approvers are displayed based on the configured rules and conditions.

The approval path can be carried out in two ways:

• Sequential: When the first approver receives an approval request, he/she approves the element. Once approved, the approval request goes to the next approver, and so on. The element does not move forward until each approver in the sequence has approved in order.
• Parallel: Multiple approvers receive an approval request and they can all approve the element at the same time. Approvers can approve the element without having to wait for the others.

If the standard approval process is used within an organization, the system administrator must activate settings to enable sequential or parallel approval. If the Dynamic Approval Routing process is used within an organization, approval will be sequential unless there are more than one approver for the same role, then approval will be parallel.

All approval files are PDF files. When conducting the approval from either the Tasks list or from eShare, the user will receive a PDF print version of the file to review (rather than the actual file being visible in the system). Also, approval files are generated according to the user’s permissions to view fields having specific security levels.

In the Request Approval window, there is a checkbox to add the approvers as frequent collaborators. This function will only add these users as frequent collaborators under My Setup > Preferences. It will not add these users as collaborators on the requisition currently open. Also note that users will need to log out and log back in to see the change applied to their list of frequent collaborators under My Setup > Preferences.

As of Feature Pack 11A.4, the “Notify me once this task is complete” checkbox has been removed from the Request Approval window for requisitions and offers because this option did not have any purpose. Notifications about the progress of approvals can be configured by system administrators if desired.

Approvers and Frequent Approvers

An approver is a Recruiting Center user who will approve requisitions and/or offers.

A list of approvers can be defined by the system administrator at the department level. A list of personal default approvers, called frequent approvers, can also be defined by the user in the My Setup feature. When a requisition
and/or offer is ready to be approved (by selecting the Request Approval action), the approval path is selected by default as follows:

- If frequent approvers were selected under My Setup, these approvers will be automatically selected.
- If frequent approvers were not selected under My Setup, the approvers set for the department by the system administrator will be selected automatically.

When a user selects approvers, the selector only displays users who can be potential approvers. It is possible that no approvers are displayed if none of them are allowed to do the approval. An approver must be an active user and have the user type permission to approve requisitions and/or offers.

**Requirements to Approve Requisitions**

The minimum requirements to approve requisitions are described below.

- The user must be active.
- The user belongs to the user group of the requisition. (Note: For Dynamic Approval Routing, this requirement is not enforced; users not belonging to the group can be approvers.)
- The user has the following permissions:

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Recruiting Center AND/OR</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Other</td>
</tr>
<tr>
<td>Access the Response Center (used primarily by eShare users)</td>
<td></td>
</tr>
<tr>
<td>View requisitions</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Requisitions</td>
</tr>
<tr>
<td></td>
<td>The user can view requisitions in any context meaning that as long as the user can view the object in some circumstances, he/she will be able to access the object to be approved, EVEN if that object is not otherwise visible to the user. For example: a manager can view requisitions that he/she owns but the requisitions being routed for approval is not owned by him/her.</td>
</tr>
<tr>
<td>Allow access to professional requisitions OR Allow access to hourly requisitions OR Allow access to campus requisitions OR Allow access to contingent requisitions OR Allow access to executive requisitions</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Requisitions</td>
</tr>
<tr>
<td></td>
<td>The requisition type here must match the type of the requisition being approved.</td>
</tr>
<tr>
<td>Approve requisitions</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Requisitions</td>
</tr>
</tbody>
</table>

**Requirements to Approve Offers**

The minimum requirements to approve offers are described below.

- The user must be active.
- The user belongs to the user group of the requisition. (Note: For Dynamic Approval Routing, this requirement is not enforced; users not belonging to the group can be approvers.)
- The user has the following permissions:
<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Recruiting Center AND/OR</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Other</td>
</tr>
<tr>
<td>Access the Response Center (used primarily by eShare users)</td>
<td></td>
</tr>
<tr>
<td>View requisitions</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Requisitions</td>
</tr>
<tr>
<td></td>
<td>The user can view requisitions in any context meaning that as long as the user can view the object in some circumstances, he/she will be able to access the object to be approved, EVEN if that object is not otherwise visible to the user. For example: a manager can view requisitions that he/she owns but the requisitions being routed for approval is not owned by him/her.</td>
</tr>
<tr>
<td>Allow access to professional requisitions OR</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Requisitions</td>
</tr>
<tr>
<td>Allow access to hourly requisitions OR</td>
<td></td>
</tr>
<tr>
<td>Allow access to campus requisitions OR</td>
<td></td>
</tr>
<tr>
<td>Allow access to contingent requisitions OR</td>
<td></td>
</tr>
<tr>
<td>Allow access to executive requisitions</td>
<td></td>
</tr>
<tr>
<td>Access requisition-specific candidate lists</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Candidates</td>
</tr>
<tr>
<td>View offers</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Offers</td>
</tr>
<tr>
<td></td>
<td>The user can view offers in any context meaning that as long as the user can view the object in some circumstances, he/she will be able to access the object to be approved, EVEN if that object is not otherwise visible to the user. For example: a manager can view requisitions that he/she owns but the requisition for the offer being routed for approval is not owned by him/her.</td>
</tr>
<tr>
<td>View internal job submissions (if the candidate is an internal candidate)</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Candidates</td>
</tr>
<tr>
<td></td>
<td>This permission only applies if the candidate receiving the offer is internal and the user needs it also granted at some level, regardless of the context level - like view offers and view requisitions.</td>
</tr>
</tbody>
</table>

**Requirements to Terminate an Approval Path**

The requirements to terminate a requisition approval path is described below.

- The user has the permission to edit requisitions, AND
- The user is the originator of the approval path, OR
- The user is the owner of the requisition (that is, manager, manager assistant, recruiter, recruiter assistant).
Approving Requisitions and Offers via the Tasks List or eShare

Recruiting Center users have the ability to approve requisitions and offers either via the Tasks list and/or eShare.

System administrators can choose the methods of approval for different users:

- **eShare**: available to users when the *Access response center* user type permission is granted (Configuration > [SmartOrg] Administration > User Types > Recruiting > General) and when the user's preference for *Enable eShare Center E-mail* is set to True (Recruiting > My Setup > Preferences).
- **Tasks list**: Tasks are available to users if system administrators have configured the Tasks channel into the user's center stage and/or they have granted access to the Core Navigation Bar in the user's configuration profile.
- **Either eShare or Tasks list**: if eShare and the Tasks channel are both configured for the user, the user can receive both eShare approval requests and also track them in the Tasks list. Users can decide on approval from either location. Tasks executed from the eShare center will be automatically updated in the user's Tasks list as well. If an approval is executed from the Tasks list, the eShare request will indicate that the decision has already been made and the eShare is no longer active.

Requisition Approval Acknowledgment

eShare users have the ability to receive a confirmation of their requisition approvals.

This feature is automatically available on all eShare approvals. When users respond to an eShare approval request, there is a check box to trigger the receiving of an approval acknowledgment. If users choose to receive the acknowledgment, upon completing their decision on the request, the users will receive an e-mail message confirming their action.

Three system message templates have been created for this purpose. There is a standard message available and if desired, system administrators can modify the text of the message sent. The acknowledgment sent will depend on the decision of the approver:

- Requisition Approved Acknowledgment
- Requisition Rejected Acknowledgment
- Requisition Passed Acknowledgment

Note that approvals decided via the Tasks channel do not have an acknowledgment option; users can view their completed tasks in the Tasks channel by clearing the *Hide completed tasks* option.

Configuring the Access to Elements Being Approved

Access to elements being approved by users must be configured.

For eShare via email:

- The eShare Response Center Product must be activated by Oracle Support.
- The *Access the Response Center (used primarily by eShare users)* permission must be granted in SmartOrg (Configuration > [SmartOrg] Administration > User Types > Recruiting > Other).
- The *Enable eShare Email for Response Center Access* user's preference must be enabled in the Recruiting Center (Recruiting Center > Resources > My Setup > Preferences). Note: The same setting exists under Configuration > [General Configuration] Settings. By default, it is set to No for all users. If changing the value of this setting, the change will apply to all users that have not manually edited their own user preference.

For Tasks via the Recruiting Center:
• The *Access Recruiting Center* permission must be granted in SmartOrg (Configuration > [SmartOrg] Administration > User Types > Recruiting > Other).
• Access must be given to the tasks via one or both of the following means:
  • The Tasks tab available in the core navigation bar. The core navigation bar is enabled via the SmartOrg Configuration Profiles feature.
  • The Tasks channel available in the main panel. The Tasks channel is configured via the Center Stage feature. The Center Stage is then associated to the user's configuration profile. See *Center Stage*.

### Requisition Approval Rerouting After Changes

Configuration options when activated can force requisitions to automatically be rerouted for approval when certain business scenarios occur.

System administrators can configure certain settings to force requisitions to automatically be rerouted for approval when certain business scenarios occur. System administrators define which scenarios they wish to activate. Each of the settings can be individually set to control if that situation when it occurs will cause the requisition to be re-routed for approval:

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restart Approval Process After &quot;Cancel&quot; Step</td>
<td>Restart the approval process when reopening a requisition after it has been canceled.</td>
</tr>
<tr>
<td>Restart Approval Process After &quot;Fill&quot; Step</td>
<td>Restart the approval process when reopening a requisition after it has been filled.</td>
</tr>
<tr>
<td>Restart Approval Process After &quot;On Hold&quot; Step</td>
<td>Restart the approval process when reopening a requisition after it has been placed on hold.</td>
</tr>
<tr>
<td>Restart Approval Process After Editing the Number of Positions</td>
<td>Restart the approval process when editing the number of positions for the requisition.</td>
</tr>
<tr>
<td>Restart Approval Process After Editing the Salary Fields</td>
<td>Restart the approval process when editing the salary fields in the requisition file.</td>
</tr>
</tbody>
</table>

Immediately upon a Recruiting Center user has performed an action that makes true one of the above activated settings:

• The requisition status will return back to Draft.
• The requisition will be unposted.
• The requisition tasks will be deleted.

Also, if the requisition was posted and the Recruiting Center user modifies the requisition file, the requisition will be re-routed to the Draft status and it will also be unposted.

Example: If a Recruiting Center user re-opens a canceled requisition and if the *Restart Approval Process After "Cancel" Step* setting has been activated, rather than the requisition reverting back to it's original state, the requisition will revert back to the status of To be approved. The requisition must be reapproved before sourcing for the position can be restarted. The prior approval process will still be visible from the tracking history, but the approval tab will reflect the most current approval cycle. If the requisition had originally been canceled during the approval process, the prior approval cycle that was in process will be terminated and will be replaced by the new one which must be initiated from the beginning.
Setting a Default Approval Path for Requisitions

Setting a default approval path for requisitions allows you to specify, at the department level, which approvers will be selected by default when users are requesting the approval of a requisition. Such default approval path is used when no default approval path is set at the user level and when a department is selected while creating a requisition.

Prerequisite

The Enable Department setting must be activated.

A department must be created before defining approvers.

Configuration > [Recruiting] Administration > Department List

Steps

1. Click on the desired department.
2. Under the Approver Preferences - Requisitions section, click ✉.
3. Select one or several approvers from the user list then click Done.
4. To change the order of the approvers, select a number from the list next to the approver, then click Reorder.
5. Click Done.

Setting a Default Approval Path for Offers

Prerequisite

The Enable Department setting must be activated.

A department must be created.

Configuration > [Recruiting] Administration > Department List

Steps

1. Click on the desired department.
2. Under the Approver Preferences - Offers section, click ✉.
3. Select one or several approvers from the user list.
4. Click Done.
5. To change the order of the approvers, select a number from the list next to the approver, then click Reorder.
6. Click Done.

Result

The default approval path for offers has been created. The approvers selected by default when users are requesting the approval of an offer are selected at the department level.
## Approval - Permissions and Settings

The following permissions and settings are used for the approval functionality.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forego the approval process</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Offers &gt; Approval</td>
</tr>
<tr>
<td>Choose to pass when this user is asked to approve an offer</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Offers &gt; Approval</td>
</tr>
<tr>
<td>Amend an approval path</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Offers &gt; Approval</td>
</tr>
<tr>
<td>Decide for other approvers</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Offers &gt; Approval</td>
</tr>
<tr>
<td>Send an approval request reminder for offers</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Offers &gt; Approval</td>
</tr>
<tr>
<td>Approve requisitions</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions &gt; Approval</td>
</tr>
<tr>
<td>Save a requisition as open</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions &gt; Approval</td>
</tr>
<tr>
<td>Choose to pass when this user is asked to approve a requisition</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions &gt; Approval</td>
</tr>
<tr>
<td>Choose to pass when this user decides on behalf of another approver</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions &gt; Approval</td>
</tr>
<tr>
<td>Create an approval path</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions &gt; Approval</td>
</tr>
<tr>
<td>Decide for other approvers when creating an approval path</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions &gt; Approval</td>
</tr>
<tr>
<td>Amend an approval path created by this user</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions &gt; Approval</td>
</tr>
<tr>
<td>Remove approver, change decision of approver, or change approved requisition recipient when amending an approval path created by this user</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions &gt; Approval</td>
</tr>
<tr>
<td>Amend an approval path created by another user (user B)</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions &gt; Approval</td>
</tr>
<tr>
<td>Remove approver, change decision of approver, or change approved requisition recipient when amending an approval path created by another user</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions &gt; Approval</td>
</tr>
<tr>
<td>Send an approval request reminder for requisitions</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions &gt; Approval</td>
</tr>
</tbody>
</table>
Data Access Security

When conducting an approval, users will be able to see data they are authorized to view based on their viewing permissions. For example:

- If a user is authorized to view fields with the General security level, then these fields will be displayed on the file. Fields having the Restricted or Confidential security level will not appear on the file.
- If a user is only authorized to view compensation data on requisitions where he/she is the owner, compensation fields on requisitions outside of their ownership will not be displayed.

If a system administrator has forgotten to give users at least viewing permission to fields with the General security level, general viewing rights will be granted to allow the file to render.

Exception Scenarios

If a user’s group changes so that they no longer belong to the authorized approving user group: This will not change the user’s ability to execute the approval. The user will still receive the task and will be able to complete the approval review and decision.

If a user’s permissions change so that they are no longer authorized to conduct the approval: The user will not be able to complete the approval request. The task will remain assigned to the user but when trying to complete the task, the user will receive a message indicating that the user is not authorized. For the approval process to proceed, the user’s permissions will need to be changed, or the approval path will need to be amended.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Approval Models</td>
<td>Allows collaborative (parallel) approval in addition to sequential approval. It allows forwarding an approval request to another approver if the user has the permission to amend approval paths. For details, contact Oracle Support.</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Offer Default Approval Model</td>
<td>Defines the approval model that will be used by default when users are creating an offer approval request.</td>
<td>Sequential</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Requisition Default Approval Model</td>
<td>Defines the approval model that will be used by default when users are creating a requisition approval request.</td>
<td>Sequential</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Offer Approval Workflow Activation</td>
<td>Determines whether or not approvals are used on offers.</td>
<td>Optional</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Offer Letter Must be Selected for Approval Request</td>
<td>Allows a request for approval only if an offer letter has been selected.</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
</tbody>
</table>

For requisitions approval, there are two standard message templates that behave as follows:

- Standard Notification of a Requisition Approval Request (E-share): Message sent to approvers for both the initial request and any reminders, provided that the eShare center has been activated.
• Standard Notification of a Requisition Approval Request: Message sent to approvers for both the initial request and any reminders, in cases where the eShare center has not been activated. In this message, the Respond hyperlink does not appear by default (to prevent cases where the eShare center is not available). If users are receiving this message for requisition approval requests, it means that you are trying to use the eShare function but it is not implemented. You should call support and ask to have the eShare Center activated.

The above behavior does not exist for offer approval notifications. For offers, there is only one offer approval notification template; it is sent in all cases, regardless of whether or not the eShare center has been activated.
Dynamic Approval Routing

Dynamic Approval Routing

Dynamic Approval Routing is an advanced tool that automatically populates requisition and offer approvers through the use of inclusion and exclusion rules. These rules, based primarily on functional and hierarchical roles, enable customers to enforce processes and simplify the approval process for the initiator.

Once the Dynamic Approval Routing module has been enabled, it becomes available in the Taleo Configuration menu. The system administrator is responsible for configuring and activating the Dynamic Approval Routing feature.

Basically, the Dynamic Approval Routing works as follows: When the Dynamic Approval Routing is activated and implemented, when a user routes a requisition or an offer for approval, if the Dynamic Approval Routing is relevant for the context of the requisition or the offer, it will predetermine the list and sequence order of approvers. The initial list of approvers may or may not be modified by the user routing the approval request (the user must have been granted a user type permission). With the path already generated, the user can simply click to request that the approval process be initiated. Approvers will receive approval requests just as they do with the standard approval functionality.

The configuration of the Dynamic Approval Routing involves many steps for the system administrator:

- defining the “reports to” structure and configuring users involved in the Dynamic Approval Routing process
- defining hierarchical and functional roles
- defining inclusion and exclusion rules
- configuring approval paths and sequences
- granting related user type permissions

Once the Dynamic Approval Routing is configured, it is important to test the workflow with a small sample that can be easily controlled prior to full deployment. This step is recommended to ensure that the desired results are achieved prior to rolling out to the entire employee population.

Checklist prior to testing:

- Ensure roles are activated and assigned properly to users.
- Ensure all Dynamic Approval Routing components are active (approval paths, rules, sequences).
- Ensure inclusion rules are included on the active workflow for every role expected to be included in the approval workflow.
- Ensure sequences are defined for the desired Organizations-Locations-Job Fields contexts and contain all possible approver roles.
- To test, observe structure for active path and create entity (requisition or offer) within that category.
- Observe the approval path presented to the initiating user and ensure it is as expected.

System changes after an object is routed for approval will not change the list of approvers. For example: If a new approval path is created and activated, it will only impact newly created approval requests, it will not impact the approvals that are already in process. If a user replaces another user in a functional role, the update will only affect new approval requests, not existing approvals in process where the prior user was assigned. (Customers can still use the delegate feature for an approval task assigned to one user to be routed to a different user).

What happens when the system finds more than one appropriate match:
• If a workflow has a rule invoking the inclusion of a functional role, it says “the best” matching user will be assigned a task. Based on the configuration, it is possible that more than one match would be equally suitable. In such case, if more then one user included in a functional role matches the given Organization-Location-Job Field context, then all those users are included within the same sequence in the approval path (that is, users will be included in parallel).

• If a user matches more than one inclusion rule, the system removes duplicate and the first appearance of user in the approval path is kept and all others are removed. For example, a compensation team has an opening and the director of compensation is pulled in for both a functional and hierarchical role. Once all roles are resolved (the same user is included because its hierarchical role is included and its functional role is included), the system removes duplicate.

• If an approval request matches the context of more than one sequence, the system protects itself. It is not possible to create two sequences in the same Organization-Location-Job Field context.

In cases where there may be more than one contextual match, the system does not contain logic to prevent a user from creating duplicate contexts that may conflict with one another when used except for contextualization of sequences.

Configuration

Note that there is only one offer approval path configuration area, as opposed to requisitions where there is one per requisition type. Also, offer inclusion rules allow for more conditions to be built using Offer fields (including UDFs), and comparison of offer salary and requisition salary.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage approval paths.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Approval path</td>
</tr>
<tr>
<td>Access exclusion rules.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Administration</td>
</tr>
<tr>
<td>All requisition approval permissions are grouped under the Approval functional domain.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Requisitions &gt; Approval</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Approval Models</td>
<td>Enhances the approval path model for requisitions and offers. Allows collaborative (parallel) approval in addition to sequential approval. Allows forwarding an approval request to another approver if the user has the permission to amend approval paths.</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
</tbody>
</table>

**Dynamic Approval Routing Approval Path**

An approval path is used for the Dynamic Approval Routing (DAR) to determine how approvals will behave for an approval path category (offers or requisitions).

Only one approval path can be active per requisition type at any given time. The approval path set for offers is reused for all offers being created.

For defining the approval path of a DAR, the system administrator defines:

• Properties: Name and code used when referencing the path.
• Notifications: There is one notification specific for Dynamic Approval Routing to help with the scenario where there is an approver inserted into a path who does not have the authorization to access or approve a requisition. When this scenario occurs, the users specified via the People notified of users without access notification setting will be sent a correspondence informing them so that they can take action to fix the situation by either updating roles in the system to ensure the user is granted the correct permissions, or someone else can go in an approve on this person's behalf. The message template for this correspondence is available in the correspondence manager and is titled Approval process access error.

• Settings: Different settings used for the DAR, that is if comments will be mandatory when rejecting an approval, if the sequence of approvers generated by DAR will be presented to the approval initiator and/or subsequent approvers.

Dynamic Approval Routing Reports to Structure

The “Reports to” structure is used in the Dynamic Approval Routing module to define to whom each user reports to.

If a customer intends to use hierarchical roles or the reports to ("up # levels") to populate the flow, the "Reports to" structure must be implemented for Dynamic Approval Routing. If a customer intends to use only functional roles, the customer can still implement Dynamic Approval Routing but the "Reports to" structure does not need to be populated.

The “Reports to” structure should be done via a user integration. If an integration is not used, the system administrator can alternatively manually configure all users involved in a Dynamic Approval Routing in the User Accounts section of SmartOrg.

Locking Generated Approval Paths

With the introduction of the Dynamic Approval Routing (DAR) feature, a mechanism was required so users would not be able to remove or reorder approval paths generated by the DAR engine.

This feature is available for all but makes practical sense to use in conjunction with the Dynamic Approval Routing feature.

The following permission allows system administrators to control if a user type is authorized to remove or reorder the pre-populated approvers presented during the request approval action.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit approvers when requesting approvals</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Other</td>
</tr>
</tbody>
</table>

When the Dynamic Approval Routing is used to generate the list of approvers, this permission can be used to lock out the user’s ability to modify that list of approvers. This permission can also be used if the requisition approval path is always created from scratch (which means the user has no frequent approvers and is not using requisition duplicate function) and the customer wants to enforce that for offer approvers; the same approvers who approved the requisition must also approve the offer.

When a user does not have the above permission:

• When using the Request Approval action (for requisitions or offers), the user conducting the approval request cannot remove nor reorder system-generated approvers. These may have been inserted from DAR, requisition duplication, frequent approvers, or from requesting offer approval (in which case a starting list of approvers always exists, either via DAR, frequent approvers, or pulling in the initial approvers from the requisition).
• The user can add and reorder additional approvers, and remove approvers that he/she has added.
• The user, if authorized, may amend approval paths once routed for approval (this is managed by another permission).

When the permission is not granted, an x will not be present when hovering over an approver and the order sequence drop-down boxes will be unable to be selected.

Setting Up the Dynamic Approval Routing

Prerequisite
The Dynamic Approval Routing feature must be activated.

Configuration
Steps
1. Define the Dynamic Approval Routing “Reports to” structure.
2. Create and configure hierarchical roles.
3. Create and configure functional roles.
4. In SmartOrg, under User Types, grant requisition approval user type permissions.
5. Create and configure exclusions rules.
6. Create and configure inclusion rules.
7. Define the Dynamic Approval Routing approval path.
8. Create and configure sequences.
9. Test the workflow with a small sample.
10. Activate the Dynamic Approval Routing approval path.

Defining the Dynamic Approval Routing Reports to Structure

Prerequisite
Configuration > SmartOrg Administration > User Accounts

Steps
1. Click on a user account.
2. Click Edit next to Employee Information.
3. Set the employee status to Current.
   A user cannot be designated as someone’s manager unless he/she is a “current” employee.
4. Specify the employee manager.
   The manager is the person to whom the user reports to. Note that in order for a user to be available in the Employee Manager field, he/she must be classified as “Current” in the Employee Status field.
5. Select an Organization and a Location.
   Note that these fields are not relevant to the functioning of Dynamic Approval Routing. They are required to support behaviors in Taleo Performance. These fields are not required to be specified if using Integration to update the employee information.
6. Click Save.

Activating an Approval Path Category

Prerequisite
The Dynamic Approval Routing feature must be activated.
The *Manage approval paths* user type permission must be granted in the SmartOrg User Types feature.

**Configuration**

**Steps**

Under Dynamic Approval Routing, click Activate next to an approval path category.

**Result**

When an approval is requested by a user, if the approval path category is activated for the approval being requested, then it is the dynamic approval routing process that will be used in Taleo Recruiting.

**Next Step**

Creating an approval path.

---

**Deactivating an Approval Path Category**

**Prerequisite**

The Dynamic Approval Routing module must be activated.

The *Manage approval paths* user type permission must be granted in the SmartOrg User Types feature.

**Configuration**

**Steps**

In the Configuration page, under Dynamic Approval Routing, click Deactivate next to an approval path category.

**Result**

When an approval is requested by a user, if the approval path category is deactivated for the approval being requested, then it is the standard approval process that will be used.

---

**Creating an Approval Path**

**Prerequisite**

The Dynamic Approval Routing must be activated.

The *Manage approval paths* user type permission must be granted in the SmartOrg User Types feature.

**Configuration**

**Steps**

1. Under Dynamic Approval Routing, click on an approval path category.
2. Click Create next to Approval Paths.
3. Complete the fields and selections.
4. Click Save.

**Result**

A new approval path is available for the chosen approval path category.

**Next Step**

Creating a sequence and adding inclusion and exclusion rules.
Deleting an Approval Path

Prerequisite
The Dynamic Approval Routing module must be activated.
The \textit{Manage approval paths} user type permission must be granted in the SmartOrg User Types feature.
The approval path must be draft.

Configuration

Steps
1. Under Dynamic Approval Routing, click on an approval path category.
2. Click Delete next to an approval path.

Result
The approval path is no longer available for the chosen approval path category.

Activating an Approval Path

Prerequisite
The Dynamic Approval Routing must be activated.
The \textit{Manage approval paths} user type permission must be granted in the SmartOrg User Types feature.
The approval path must be inactive or draft and no other approval path must be active.
At least one sequence and one rule must be included in the path.

Configuration

Steps
1. Under Dynamic Approval Routing, click on an approval path category.
2. Click on an approval path.
3. Click Activate next to the name of the approval path.

Result
The activated approval path can no longer be assigned the draft status. The approval path is available to users when requesting an approval for the given category.

Editing an Approval Path

Prerequisite
The Dynamic Approval Routing must be activated.
The \textit{Manage approval paths} user type permission must be granted in the SmartOrg User Types feature.

Configuration

Steps
1. Under Dynamic Approval Routing, click on an approval path category.
2. Click Edit next to the approval path.
3. Make changes as required.
4. Click Save.

**Deactivating an Approval Path**

**Prerequisite**
The Dynamic Approval Routing module must be activated.
The Manage approval paths user type permission must be granted in the SmartOrg User Types feature.
The approval path must be active.

**Configuration**

**Steps**
1. Under Dynamic Approval Routing, click on an approval path category.
2. Click on an approval path.
3. Click Deactivate next to the name of the approval path.

**Result**
The approval path is no longer available to users when requesting an approval for the given approval path category.

**Testing the Dynamic Approval Routing Workflow**

By narrowly constraining the Organization-Location-Job Field sequence contexts on the active workflow, it is possible to test your Dynamic Approval Routing workflow prior to full deployment with a small sample that can be easily controlled. This step is recommended to ensure that the desired results are achieved prior to enrolling out to the entire employee population.

**Prerequisite**

**Configuration**

**Steps**
1. Ensure roles are activated and assigned properly to users.
2. Ensure all DAR components are active (approval paths, rules, sequences).
3. Ensure inclusion rules are included on the active workflow for every role expected to be included in the approval workflow.
4. Ensure sequences are defined for the desired Organizations-Locations-Job Fields contexts and contain all possible approver roles.
5. Observe structure for active path and create entity (requisition) within that category.
6. Observe the approval path presented to the initiating user and ensure it is as expected.
Dynamic Approval Routing Rule

Dynamic Approval Routing Rules

Rules are used to dynamically determine the circumstances whereby specific users/roles will be included in an approval path.

Rules are used in the Dynamic Approval Routing feature to allow the approval path to be very flexible and accommodate a myriad of business requirements. Every user and/or role to be added to an approval path must be added by a rule.

Two types of rules are used for the Dynamic Approval Routing:

- inclusion rules
- exclusion rules

When configuring the Dynamic Approval Routing, it is recommended to create rules first, then create the approval paths because inclusion rules are required to populate paths. Once rules have been defined, the system administrator can configure the actual approval path.

Configuration

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Approval Paths</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt;</td>
</tr>
<tr>
<td></td>
<td>Configuration &gt; Approval Path</td>
</tr>
</tbody>
</table>

Exclusion Rule

Exclusion rules define exceptional roles that may have been included in certain structure but an exception needs to be applied to remove that role in certain Organization-Location-Job Field circumstances.

Exclusion rules are optional. When activated, unlike inclusion rules, they automatically apply to all approval paths for that requisition, they do not need to be inserted into the approval path definition to work. Exclusion rules will omit matching approvers from the approval path.

Example: Never include the Director when the Organization is Canadian Operations.

When defining exclusion rules, three options are available:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All roles included between the following roles</td>
<td>When this type of rule is used, the system will ignore all roles in the system and pay attention only to the employee reports to structure. The system will look at who is the Manager of the Requisition/Offer and will go up the number of specified direct reports from that manager.</td>
</tr>
<tr>
<td>Only the selected role</td>
<td>Allows the selection of a specific hierarchical or functional role in the approval path. Note: when a hierarchical role is used, the system will look at who is the Manager of the Requisition/Offer and will go through the “reports to” structure until it finds an employee with the specified role.</td>
</tr>
</tbody>
</table>
It is recommended to create rules first, then create the approval paths because inclusion rules are required to populate paths.

## Inclusion Rule

Inclusion rules define the roles that will be included in the approval path.

Rules are used to dynamically determine the circumstances whereby specific users/roles will be included in an approval path. Rules allow the approval path to be very flexible and accommodate a myriad of business requirements. Every user and/or role to be added to an approval path MUST be put there by a rule and where DAR is in use at least one approver must be invoked.

Once the inclusion rules are created, the system administrator determines what rules will be activated for the active approval workflow. Any combination of active rules can be used.

At least one inclusion rule must be added to an approval path prior to activation.

There are two types of inclusion rules:

- **Unconditional**
- **Conditional**

Unconditional inclusion rules always includes the role in the approval path, regardless of the context of the requisition or the offer (other than the specified requisition type for which the path is defined). Example: Always include the job posting approver. When creating an unconditional rule, the only thing that needs to be specified is the roles to be included. The operators for including roles are outlined below.
<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>the Requisition/Offer and will go through the “reports to” structure until it finds an employee with the specified hierarchical role. It will then include the first matching employee in that hierarchical role. For example, if there were two directors in the “reports to” structure and the director hierarchical role was selected, only the first director in the hierarchy would be added to the flow ordered by how they report to one another.</td>
<td></td>
</tr>
<tr>
<td>All roles included up to the specified number of levels, where the administrator specifies the role and the # of upper levels.</td>
<td>Allows the selection of a series of employees using the hierarchical role structure in the approval path. The system will use the Hiring Manager of the requisition and will go through the reports to structure until it finds the first employee with the specified role. It will then include this person and every employee in the reporting structure up to and including the first employee it finds at # hierarchical roles above the specified role in the path.</td>
</tr>
<tr>
<td>All roles between the following roles. Where two roles are defined.</td>
<td>Allows the selection of a series of employees using the hierarchical role structure in the approval path. The system will use the Hiring Manager of the requisition and will go through the reports to structure until it finds the first employee with the lower level role. It will then include this person and every employee up to and including the first employee it finds at the upper level hierarchical role.</td>
</tr>
</tbody>
</table>

Conditional inclusion rules include a role when certain conditions are met.

Example: Include the CFO on all requisitions where the base salary is > $100,000 and the Location is United States.

For conditional inclusion rules, the rule operator process is the same as it is with unconditional rules, but there is another step involved where the user creates the conditions under which the specified roles will be included in the path. When creating a condition, the first step is to define the fields to be used in the condition. For each field there are available operators to define how the field condition will work. Conditions can be applied on requisition fields as well as on offer fields, depending on the approval type. For a requisition approval path, conditions can be applied only on requisition fields. For an offer approval path, conditions can be applied only on offer fields. All Offer and Requisition fields, either user-defined or system defined, can be used to create conditions. Conditional rules used within approval paths for offers may also contain a unique condition that compares the offer salary to the maximum salary on the requisition. Note that this comparison is entirely numeric, and does not take variables such as pay basis or currency into account when including an approver.

For example, for numeric fields, operator options include: is equal to, is less than, is greater than, is not equal to, is less than or equal to, is great than or equal to. Once the operator is set, the value is determined for the condition. An example of a condition might be: Salary is greater than or equal to 100,000K US.

Once a condition is created it can be added to the formula builder. The system administrator can add as many conditions as necessary to define the necessary rules. Once the conditions have been added, they can be strung together using boolean operator logic: And, Or, (,) and Not are supported functions. The conditions and formula functions can be moved around in the formula area by highlighting the item (represented in orange) using the < and > keys.
Creating an Exclusion Rule

Prerequisite
The Dynamic Approval Routing feature must be activated.
The *Manage approval paths* user type permission is required.

Configuration

Steps
1. Under Dynamic Approval Routing, click on an approval path category.
2. Click Create next to Exclusion Rules.
3. Complete fields as required.
4. Click Save.
5. Click Add next to Roles.
6. Select from the drop-down list how roles will be included in the approval process.
7. To select a role, click Search.
8. Click Save.

Result
The role to be excluded appears in the Roles section. Users associated to the role, and with a matching Organization, Location and Job Field, will not be requested for approval for that category of approval path.

Next Step
Activating an exclusion rule.

Adding a Role to an Exclusion Rule

Prerequisite
The Dynamic Approval Routing feature must be activated.
The *Manage approval paths* user type permission is required.

Configuration

Steps
1. Under Dynamic Approval Routing, click on an approval path category.
2. Click on an exclusion rule.
3. Click Add next to Roles.
4. Select from the drop-down list how roles will be included in the approval process.
5. To select a role, click Search.
6. Click Save.

Result
The role appears in the Roles list of the Exclusion Rule page. Users associated to the role will be excluded from the approval path.

Next Step
Activating an exclusion rule.
Activating an Exclusion Rule

Allows a system administrator to activate an exclusion rule so it can be used in an approval path to exclude users from approving requisitions or offers.

**Prerequisite**

The Dynamic Approval Routing feature must be activated.

The *Manage approval paths* user type permission is required.

The exclusion rule must be draft or inactive.

**Configuration**

**Steps**

1. Under Dynamic Approval Routing, click on an approval path category.
2. Click on an exclusion rule.
3. In the Exclusion Rule page, click Activate.

**Result**

The exclusion rule appears as active in the Exclusion Rules list.

Deactivating an Exclusion Rule

**Prerequisite**

The Dynamic Approval Routing feature must be activated.

The exclusion rule must be active.

The *Manage approval paths* user type permission is required.

**Configuration**

**Steps**

1. Under Dynamic Approval Routing, click on an approval path category.
2. Click on an exclusion rule.
3. Click Deactivate.

**Result**

The exclusion rule appears as inactive in the Exclusion Rules list and can no longer be used in an approval path.

Deleting an Exclusion Rule

**Prerequisite**

The Dynamic Approval Routing feature must be activated.

The *Manage approval paths* user type permission is required.

The exclusion rule must be draft.

**Configuration**
Steps

1. Under Dynamic Approval Routing, click on an approval path category.
2. Click Delete next to the exclusion rule.

Result

The exclusion rule no longer appears in the Exclusion Rules list; it is permanently deleted. It therefore can no longer be used in an approval path.

Removing a Role from an Exclusion Rule

Prerequisite

The Dynamic Approval Routing feature must be activated.

The *Manage approval paths* user type permission is required.

Configuration

Steps

1. Under Dynamic Approval Routing, click on an approval path category.
2. Click on an exclusion rule.
3. Click Remove next to the role.

Result

The role will no longer appear in the Roles list of the Exclusion Rule page. Users associated to the role can be selected in the approval process.

Creating a Conditional Inclusion Rule

Prerequisite

The Dynamic Approval Routing feature must be activated.

The *Manage approval paths* user type permission is required.

Configuration

Steps

1. Under Dynamic Approval Routing, click on an approval path category.
2. Click Conditional Rule next to Inclusion Rules.
3. Complete fields as required.
4. Click Save.
5. Click Edit next to Conditions.
6. Create a condition by completing the fields then click Add this criteria to formula.
7. Click Save.
8. Click Add next to Roles.
9. Select from the drop-down list how roles will be included in the approval process.
10. To select a role, click Search.
11. Click Save.
Result
The rule appears in the Inclusion Rules list of the Approval Paths and Rules page.

Next Step
Activating an inclusion rule.

Creating an Unconditional Inclusion Rule

Prerequisite
The Dynamic Approval Routing feature must be activated.

The Manage approval paths user type permission is required.

Configuration

Steps
1. Under Dynamic Approval Routing, click on an approval path category.
2. Click Unconditional Rule next to Inclusion Rules.
3. Complete fields as required.
4. Click Save.
5. Click Add next to Roles.
6. Select from the drop-down list how roles will be included in the approval process.
7. To select a role, click Search.
8. Click Save.

Result
The rule appears in the Inclusion Rules list of the Approval Paths and Rules page. The role is added to an approval path regardless of the Organization-Location-Job Field structure.

Next Step
Activating an inclusion rule.

Activating an Inclusion Rule

Prerequisite
The Dynamic Approval Routing feature must be activated.

The inclusion rule must be inactive or draft.

The Manage approval paths user type permission permission is required.

Configuration

Steps
1. Under Dynamic Approval Routing, click on an approval path category.
2. Click on an inclusion rule.
3. Click Activate.

Result
The inclusion rule appears as active in the Inclusion Rules list so it can be used in an approval path to include users from approving requisitions or offers.
Deactivating an Inclusion Rule

Prerequisite
The Dynamic Approval Routing feature must be activated.
The inclusion rule must be active.
The Manage approval paths user type permission is required.

Configuration

Steps
1. Under Dynamic Approval Routing, click on an approval path category.
2. Click on an inclusion rule.
3. Click Deactivate.

Result
The inclusion rule appears as inactive in the Inclusion Rules list and can no longer be used in an approval path.

Deleting an Inclusion Rule

Prerequisite
The Dynamic Approval Routing feature must be activated.
The Manage approval paths user type permission is required.
The inclusion rule must be draft.

Configuration

Steps
1. Under Dynamic Approval Routing, click on an approval path category.
2. Click Delete next to an inclusion rule.
3. Click Yes to confirm the deletion.

Result
The inclusion rule no longer appears in the Inclusion Rules list and is permanently deleted from the database.

Next Step
Activating an inclusion rule.

Adding a Role to an Inclusion Rule

Prerequisite
The Dynamic Approval Routing feature must be activated.
The Manage approval paths user type permission is required.

Configuration

Steps
1. Click on an approval path category.
2. Click on an inclusion rule.
3. Click Add next to Roles.
4. Select from the drop-down list how roles will be included in the approval process.
5. To select a role, click Search.
6. Click Save.

**Result**
The role appears in the Roles list of the Inclusion Rule page. Users associated to the role will be requested for approval.

**Next Step**
Activating an inclusion rule.

**Removing a Role from an Inclusion Rule**

**Prerequisite**
The Dynamic Approval Routing feature must be activated.
The *Manage approval paths* user type permission is required.

**Configuration**

**Steps**

1. Under Dynamic Approval Routing, click on an approval path category.
2. Click on an inclusion rule.
3. Click Remove next to the role.

**Result**
The role no longer appears in the Roles list of the Inclusion Rule page.
Dynamic Approval Routing Sequence

Sequence

A sequence is the order in which the approvers will be displayed to the user when requesting approval.

Sequences are used in the Dynamic Approval Routing (DAR) feature. A sequence is part of the approval path and determines the order of approvers (roles) for the assigned context. Roles may be set as “required” on a sequence so that progress is halted if selected roles are not included. If these approvers are not available when the path is generated, the user will not be able to proceed in generating the approval request and will instead be required to contact their system administrator to proceed. This will allow the system administrator to intervene and review configuration to ensure the appropriate approvers are in place for the requisition.

Multiple sequences may be active on a path at one time. The sequences are contextualized, so the sequence can be different for different Organizations, Locations and/or Job Fields. Where DAR is activated, a sequence must exist. It is recommended that a default sequence be used to ensure approvals can proceed if a context does not match any other defined sequence.

It is possible to create a sequence and not give it a specific context. In this case, the sequence will reside at the root level and will apply as the default sequence to be used in any case where a more specific context matching sequence is not found.

It is important when defining a sequence to include all possible roles that may ever be included in an approval path. Any invoked role that has no defined sequence will be randomly appended to the end of the approval path. There is no need to include Onboarding specific roles such as New Hire or Process Owner as these roles never play a part in approval routing for requisitions or offers.

Note, when the From the manager role up to the number of specified direct reports inclusion rule option is used, these individuals will always appear first in the sequence before any other approvers.

Configuration

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>Manage Approval Paths</td>
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</tr>
<tr>
<td></td>
<td>Configuration &gt; Approval Path</td>
</tr>
</tbody>
</table>

Creating a Sequence

Prerequisite

The Dynamic Approval Routing feature must be activated.

The Manage approval paths user type permission must be granted in the SmartOrg User Types feature.

Configuration

Steps

1. Under Dynamic Approval Routing, click on an approval path category.
2. Click on an approval path.
3. Click Create next to Sequence.
4. Complete fields as required.
5. Click Save.
Result
The approvers will be requested for approval in the selected order.

Next Step
Adding a role to a sequence.

Deleting a Sequence

Prerequisite
The Dynamic Approval Routing feature must be activated.
The Manage approval paths user type permission must be granted in the SmartOrg User Types feature.

Configuration

Steps
1. Under Dynamic Approval Routing, click on an approval path category.
2. Click on an approval path.
3. Click Delete next to the sequence.

Result
The sequence is removed of the Sequence list of the approval path page, and the sequence will no longer be executed when the approval path is used in Taleo recruiting.

Next Step
If the approval has no sequence, a new sequence must be created to be able to activate the approval path.

Adding a Role to a Sequence

Prerequisite
The Dynamic Approval Routing feature must be activated.
The Manage approval paths user type permission must be granted in the SmartOrg User Types feature.

Configuration

Steps
1. Click on an approval path category.
2. Click on an approval path.
3. Click on a sequence.
4. Click Access the role selector.
5. Select at least one role.
6. Click Select.

Result
The role will appear in the Sequence list of the Sequence page of the approval path.

Removing a Role from a Sequence

Prerequisite
The Dynamic Approval Routing feature must be activated.
The Manage approval paths user type permission must be granted in the SmartOrg User Types feature.

**Configuration**

**Steps**

1. Under Dynamic Approval Routing, click on an approval path category.
2. Click on an approval path.
3. Click on a sequence.
4. Click Remove next to a role.

**Result**

The role no longer appears in the Sequence list of the Sequence page of the approval path.

---

**Ordering Roles in a Sequence**

**Prerequisite**

The Dynamic Approval Routing feature must be activated.

The Manage approval paths user type permission must be granted in the SmartOrg User Types feature.

More than one role must be included in the sequence.

**Configuration**

**Steps**

1. Under Dynamic Approval Routing, click on an approval path category.
2. Click on an approval path.
3. Click on a sequence.
4. Click Reorder.
5. Select a role.
6. Move the role with the arrows.
7. Click Save.

**Result**

The roles are presented in the Sequence list in the chosen order so that the role appearing at the top of the list is the first role to be requested for approval.
Functional Roles

Functional Role

Functional roles are roles functional in nature and are involved in approval workflows because of their function. A role is used to choose users that will be assigned to approve a requisition or an offer based on contextualization.

Functional roles are used in the Dynamic Approval Routing (DAR) feature.

Each role must have a single default user assigned. Each role may also have users assigned for specific Organization-Location-Job Field structure and from there are called into play in approval workflows when objects are created for their structure. If a workflow has a rule invoking the inclusion of a functional role, the best matching user will be assigned the task.

Users can be associated to more than one role in the approval path. By default, the system will:

- Create the list of roles based on the approval path inclusion rules.
- Filter roles out based on exclusion rules.
- Resolve users from roles.
- Remove duplicated users.

For example, if an approval path looks like Hiring Manager, Role-1, Role-2 and an exclusion rule is created for Hiring Manager, the final approval path will look like Role-1, Role-2. However, if one specific user was both the Hiring Manager on the requisition and was also associated to the Role-1, then this user will still be part of the final approval path as it still includes Role-1.

The configuration of functional roles is done in the Taleo Configuration menu, via the Functional Roles feature. When creating functional roles:

- Give it a name and a code.
- Assign a default assignee.
- Assign other assignees and associate them to an Organization-Location-Job Field structure. For example, you are creating an HR Leader role. You select John Smith as an assignee and associate him to the Canadian Operations organization. As a result, John is now the HR Leader for the Canadian Operations. When a functional role is invoked in an approval process the best matching employee for the role will be used. If there is no matching employee for the OLF context, then the default assignee will be used. It is possible to have multiple assignees have the same functional role in the exact same context. Only one of these approvers will be required to act as the approver on behalf of the entire set of users with that functional role and context when this is the case.

Once the employee structure of reporting relationships and all functional and hierarchical roles have been created, system administrators can begin using the Dynamic Approval Routing module to define the business rules for how approval workflows will operate. This module is implemented distinctly for each requisition type. So the steps outlined below would need to be repeated for the requisition types for which the system administrator plans to implement Dynamic Approval Routing.

Configuration

<table>
<thead>
<tr>
<th>User Type Permission</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Manage Functional and Hierarchical Roles</td>
<td>Configuration &gt; [SmartOrg] Administration &gt;</td>
</tr>
<tr>
<td></td>
<td>User Types &gt; Configuration &gt; User Management</td>
</tr>
<tr>
<td>User Type Permission</td>
<td>Location</td>
</tr>
<tr>
<td>----------------------</td>
<td>----------</td>
</tr>
<tr>
<td>View Functional and Hierarchical Roles</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Configuration &gt; User Management</td>
</tr>
</tbody>
</table>

Creating a Functional Role

**Prerequisite**
The *Manage roles* user type permission must be granted in the SmartOrg User Type feature.

**Configuration > Functional Roles**

**Steps**
1. Click Create.
2. Complete the fields.
3. Click Save.

**Result**
The new role appears in the Functional Roles list.

**Next Step**
Activating a functional role.

Editing a Functional Role

**Prerequisite**
The *Manage roles* user type permission must be granted in the SmartOrg User Type feature.

**Configuration > Functional Roles**

**Steps**
1. Click on a role.
2. Click Edit next to properties.
3. Change fields as required.
4. Click Save.

**Next Step**
The name and description of the functional role is modified.

Activating a Functional Role

**Prerequisite**
The functional role must be draft or inactive.
The *Manage roles* user type permission must be granted in the SmartOrg User Type feature.

**Configuration > Functional Roles**

**Steps**
1. Click on a role.
2. Click Activate.

**Result**
The role will be available in the role selector when creating an approval path. The role can no longer be deleted.

**Deactivating a Functional Role**

**Prerequisite**
The functional role must be active.
The *Manage roles* user type permission must be granted in the SmartOrg User Type feature.

**Configuration** > *Functional Roles*

**Steps**

1. Click on a role.
2. Click Deactivate.

**Result**
The role will no longer appear in the Role Selector page when creating or editing an approval path.

**Deleting a Functional Role**

**Prerequisite**
The functional role must be draft.
The *Manage roles* user type permission must be granted in the SmartOrg User Type feature.

**Configuration** > *Functional Roles*

**Steps**

1. Click Delete next to the role.

**Result**
The functional role is permanently deleted from the database and will no longer appear in the Functional Role list.

**Selecting a Default Assignee for a Functional Role**

**Prerequisite**
The *Manage roles* user type permission must be granted in the SmartOrg User Type feature.

**Configuration** > *Functional Roles*

**Steps**

1. Click on a role.
2. Click Edit next to Properties.
3. Select a default assignee.
4. Click Save.
Result
When requesting an approval, if no other users are selected for the role, the default assignee will be called upon for an approval using this role.

Adding an Assignee to a Functional Role

Prerequisite
The Manage roles user type permission must be granted in the SmartOrg User Type feature.

Configuration > Functional Roles

Steps
1. Click on a role.
2. Click Create next to Assignees.
3. Click Search.
4. Select a user.
5. Click Save.

Result
The selected user appears in the Assignees list of the role.
Hierarchical Roles

Hierarchical Role

Hierarchical roles are the explicitly defined roles in the organization and their order of relationships.

Hierarchical roles are used in the Dynamic Approval Routing (DAR) feature to define how high up in the organization hierarchy certain approval processes will need to reach. Only one hierarchical role can be assigned to a user.

Example: Senior Vice President > Vice President > Sr. Director > Director > Manager.

The creation of hierarchical roles is done in the Configuration menu, via the Hierarchical Roles feature. The system administrator can associate users to a hierarchical role via the Hierarchical Role feature. However, it is recommended to use an employee integration to associate users to their hierarchical role so that this information stays current and synchronized with the HRMS.

When creating hierarchical roles:

• Start from the top of the organization and go down. It will be easier to associate subordinate roles if the highest level is active first.
• Create codes that will allow to sort them in an order that represents their hierarchy. In this example, the Team Leader reports to the Manager, the Manager reports to the Director and so on.
• Specify the superior role in the Hierarchy section. For example, if creating the Manager role, the hierarchy could be Director, meaning that the Manager will report to the Director.
• Several users can be associated to one hierarchical role, but a user may only be associated to one hierarchical role.

Configuration

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<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Configuration &gt; User Management</td>
</tr>
</tbody>
</table>

Creating a Hierarchical Role

Prerequisite

The Manage roles user type permission must be granted in the SmartOrg User Type feature.

Configuration > Hierarchical Roles

Steps

1. Click Create.
2. Complete i the fields.
3. Click Save.

Result

The new role appears in the Hierarchical Roles list and can be used to choose the superior role of a hierarchy.
Next Step
Selecting a superior role.

Activating a Hierarchical Role

Prerequisite
The hierarchical role must be draft or inactive.
The `Manage roles` user type permission must be granted in the SmartOrg User Type feature.

Configuration > Hierarchical Roles

Steps
1. In the Hierarchical Roles list, click on a role.
2. In the Hierarchical Role page, click Activate.

Result
The role will be available in the Role Selector page when creating an approval path. The role can no longer be deleted.

Next Step
Selecting the superior role.

Editing a Hierarchical Role
Allows a system administrator to modify the name and description of a hierarchical role.

Prerequisite
The `Manage roles` user type permission must be granted in the SmartOrg User Type feature.

Configuration > Hierarchical Roles

Steps
1. In the Hierarchical Roles list, click on a role.
2. In the Hierarchical Role page, click Edit next to Properties.
3. In the Role Editor page, change fields as required.
4. Click Save.

Deactivating a Hierarchical Role

Prerequisite
The hierarchical role must be active.
The `Manage roles` user type permission must be granted in the SmartOrg User Type feature.

Configuration > Hierarchical Roles

Steps
1. In the Hierarchical Roles list, click on an role.
2. In the Hierarchical Role page, click Deactivate.
Result
The role will no longer be available when creating an approval path and when selecting a superior role.

Deleting a Hierarchical Role

Prerequisite
The hierarchical role must be draft.
The *Manage roles* user type permission must be granted in the SmartOrg User Type feature.

Configuration > Hierarchical Roles

Steps
In the Hierarchical Roles list, click Delete next to a role.

Result
The hierarchical role is permanently deleted from the database and will no longer appear in the Hierarchical Roles list.

Selecting a Superior Role

Allows a system administrator to select the role that will be at the top of the hierarchy.

Prerequisite
The hierarchical role must be inactive or draft.
The *Manage roles* user type permission must be granted in the SmartOrg User Type feature.

Configuration > Hierarchical Roles

Steps
1. In the Hierarchical Roles list, click on a role.
2. In the Hierarchical Role page, click Select next to Hierarchy.
3. In the Role Selector page, select a role.
4. Click Select.

Result
The selected role will be the first one to be solicited in the approval path using this role.

Adding a User to a Hierarchy

Prerequisite
The *Manage roles* user type permission must be granted in the SmartOrg User Type feature.

Configuration > Hierarchical Roles

Steps
1. In the Hierarchical Roles list, click on a role.
2. In the Hierarchical Role page, click Add next to Users.
3. In the User Selector page, select a user.
4. Click Select.

Result
The user will appear in the users list of the hierarchical role. The selected user will be called upon when an approval path uses this role.

Removing a User from a Hierarchy

Prerequisite
The Manage roles user type permission must be granted in the SmartOrg User Type feature.

Configuration > Hierarchical Roles

Steps
1. In the Hierarchical Roles list, click on a role.
2. In the Hierarchical Role page, click Remove next to a user.
3. Click Yes to confirm the deletion.

Result
The user no longer appears in the users list of the hierarchical role. The selected user will no longer be called upon when an approval path uses this role.
Assignees

Creating an Assignee
Allows a system administrator to add an assignee to a functional role.

Prerequisite
The Manage roles user type permission must be granted in the SmartOrg User Type feature.

Configuration > Functional Roles

Steps
1. In the Functional Role page, click on a functional role.
2. In the Role page, click Create next to Assignees.
3. In the New Assignee page, click Search.
4. In the User selector, select a user.
5. Click Select.
6. Click Save.

Result
The selected user will appear in the Assignees list of the role.

Deleting an Assignee
Allows a system administrator to remove an assignee from a functional role.

Prerequisite
The Manage roles user type permission must be granted in the SmartOrg User Type feature.

Configuration > Functional Roles

Steps
1. In the Functional Role page, select a functional role.
2. In the Role page, click Delete next to the assignee.
3. Click Yes to confirm the deletion.
4. Click Save.

Result
The deleted assignee no longer appears in the Assignees list of the role. The assignee will no longer be called upon for approval when the role in which it was included will be used in an approval path.

Associating an Assignee to an Organization, Location or Job Field
Allows a system administrator to contextualize the use of an assignee in a role.

Prerequisite
The assignee must be created.
The *Manage roles* user type permission must be granted in the SmartOrg User Type feature.

**Configuration > Functional Roles**

**Steps**

1. Click on a role.
2. Click on an assignee.
3. Click Add next to Organization, Location or Job Field.
4. Make a selection.
5. Click Select.

**Result**

The assignee will be available in Recruiting only if the Organization, Location or Job Field matches the Organization, Location or Job Field specified for the requisition or the offer for which an approval is being requested.

**Dissociating an Assignee from an Organization, Location or Job Field**

**Prerequisite**

The assignee must be created.

The *Manage roles* user type permission must be granted in the SmartOrg User Type feature.

**Configuration > Functional Roles**

**Steps**

1. Click on a role.
2. Click on an assignee.
3. Click Remove next to an organization, location or job field.

**Result**

The assignee will be available in Recruiting when requesting an approval for any organization, location or job field.
Correspondence

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Message Templates

Message Template

Message templates are used whenever a notification or e-mail is sent via the application. Message templates can be used, for example, during a process review, an interview scheduling, an approval process, etc.

Message templates are available via the Configuration menu:

- Message templates under Configuration (Security) are messages relating to the security of Taleo Enterprise products. They are system-generated messages provided by Taleo. For details, see Security Message Templates.
- Message templates under Specific Configuration are messages specific to each Taleo Enterprise product. Taleo provides system-generated message templates. But new message templates can also be created by system administrators. Paragraphs are added to messages. They can be accessed directly, or from within a message template.

The Message Templates list contains system-generated message templates provided with the product as well as user-defined message templates created by system administrators. User-defined message templates can be edited by system administrators. The properties, context, content, and attachments can be modified. System-generated message templates can also be edited by system administrators. The properties and content can be edited but the context (that is, the recipient, delivery type, triggering event, OLF) cannot be edited. Also note that system-generated message templates cannot be deactivated.

The Message Templates list contains the following columns. All columns (except the Actions column) can be sorted by clicking on the column header.

- Code
- Name
- Status: Active or Inactive.
- Delivery Type: Automatic, Manual, Any.
- Origin: System or User-Defined.
- Creation Date
- Last Modification Date
- Actions

The Refine by tool in the Message Templates list provides the following options: All, Name, Code, Status, Intended for, Read-only Attachment, Confidential, Used in Status, Used in Step, Used in Workflow, Language.

Message Template Key Concepts

Several elements are configured when creating message templates.

Message Template Properties: In the Properties section of a message template, the following elements are defined:

- Delivery Type: There are two types of delivery mechanisms for messages:
  - Automatic: Messages are sent by the system when a specific triggering event occurs during the hiring process. For example, a message is automatically sent when a candidate applied on a requisition. You can also specify if the system will automatically send email messages when a candidate reaches a specific step/status in a candidate selection workflow. For example, you can automatically have the system send a Congratulatory message when a candidate is moved to the Hired step.
• Manual: Recruiting Center users may decide to send messages to candidates when taking actions on a candidate file or from a candidates list.

• Message Format: A message template can be created in different formats:
  • HTML
  • Read only PDF file: The message will be converted into a read-only PDF file that will be attached to the e-mail. This will prevent candidates and other users from modifying the message.
  • Plain text

• Confidentiality: If selecting the *Once sent, this message is confidential* option, the content of the message can only be viewed by the sender of the message, by users who have the permission to view confidential messages, and by the recruiter, the recruiter assistant, the hiring manager, and the hiring manager. From the candidate file History tab, users can see that a confidential message was sent but they cannot view the content if they don't have the required permission.

• Message Header: The message header contains the To, Cc, Bcc, and Subject fields where variables can be dragged and dropped. These variables will automatically call information from the system and display it in the template.

**Context:** When creating a message template, a context can be defined in order to specify in which specific conditions the template will be used. In the Context section of a message template, the following elements are defined:

• Recipient: You can specify who will receive the message:
  • All Candidates
  • Internal Candidates
  • External Candidates
  • Referrer
  • Agent
  • Recruiting User

When more than one message template is associated to the same triggering event, the system must be able to match the correct message to send to the recipient based on audience type. We are able to create a duplicated message template with a customized audience, and when the automatic message is triggered, the system will send the correct version for that audience type, even if there is more than one possible match due to the "all candidates" selection. If a candidate is internal and an internal only audience template exists for the triggering event, the internal candidate(s) will only receive that internal audience message, even if another template exists for all candidates. If a candidate is external and an external only audience template exists for the triggering event, the external candidate(s) will only receive that external audience message, even if another template exists for all candidates.

• Delivery Type: While you first indicated the delivery type in the Properties section (Automatic or Manual), you now need to define the details in the Context section, that is the triggering event or the candidate selection workflow, step and status.

• Organization-Location-Job Field Association: If contextualization is configured for a message template, the template is available only if the Organization-Location-Job Field structure of the message template matches the Organization-Location-Job Field structure of the object for which the template is being used. For example, if a message template is created to be triggered for each new job posting in Antarctica, then the message template will be sent only for a requisition with the location Antarctica specified. Note that when sending a message in the context of a candidate's General Profile, no OLF association exists, so all messages are available regardless of the message OLF context.

**Paragraphs:** You define the content of the message by working with paragraphs. You can add existing paragraphs or create new ones.
**Attachments:** Files can be attached to message templates.

**Variables:** Messages can contain variables (or "tokens"). For example, if inserting the `{Requisition.JobTitle}` variable, the message would display the actual requisition title when the message is sent.

### Paragraph

A paragraph is a block of text added to a message template.

Paragraphs can be accessed from two places:

- Paragraphs list: The Paragraphs list is available via the Paragraphs link in the product administration menu and via the Quick Access box within the Message Templates feature.
- Message templates: Message templates are available via the Message Templates link in the product administration menu and via the Quick Access box.

The Paragraphs list contains the following columns. All columns (except the Actions column) can be sorted by clicking on the column header.

- Code
- Name
- Status: Active or Inactive.
- Creation Date
- Last Modification Date
- Actions

The Refine by tool in the Paragraphs list provides the following options: All, Code, Language, Name, Status, Text. When users enter text in the Text option and click Refresh, the system will display only the paragraphs that contain the text. Note that the text field is not case sensitive. Also, the search is performed for the selected language only.

Paragraphs can be created from either the Paragraphs list or from within a message template. When creating a paragraph from the Paragraphs list, the paragraph is available for new and existing message templates. When creating a paragraph from within a message template, the system administrator is prompted to choose whether or not the newly created paragraph should be added to the Paragraphs list. If choosing Yes, the paragraph becomes available in the Paragraphs list to view, edit, and configure. If choosing No, then the paragraph can only be accessed from within the message template.

Paragraph content is created by typing text and/or by adding variables. Variables automatically call information from the candidate file or job specific submission and display it in the template. For example, if the `{Candidate.LastName}` variable is used, then the last name of the candidate will be automatically included by the system in the outgoing message. By default, all variables are listed in the Available Variables list. However, a shorter list of variables can be displayed by entering a few letters contained in a variable. The system then automatically suggests variables containing these letters. For example, if entering the letters "add", the system could suggest the following variables: "Candidate.Address", "Candidate.Address2", "ElectronicSignature.IpAddress". Once the right variables are displayed, the system administrator can drag and drop the desired variables in the paragraph. To return to the default list of variables, the system administrator just needs to remove the letters they entered.

Paragraphs can be supplied with the system (message templates supplied with the system have default paragraphs attached to them). They can also be duplicated (when duplicating a message template, paragraphs can be duplicated) or they can be created from scratch.

Edits made to a paragraph in the Paragraphs list will affect all message templates using the paragraph, regardless of whether the edits are made directly from within a message template or from within the Paragraphs list.

When viewing a paragraph (by clicking the name of the paragraph), a section called Used In is available. Within this section, users can:
• See the list of message templates where the paragraph is used in.
• Open the message templates where the paragraph is used in. Users have the ability to modify the message templates from there.
• See if the paragraph is included by default in the message templates.
• Preview the message templates with the paragraph in it. When previewing a message template, all the paragraphs included by default in the message template are displayed. The paragraph from which the message template was opened is highlighted in yellow if more than one paragraph is included in the message template.

Variable

Variables are strings of text replaced by contextual data that you can include in a message or a paragraph.

Variables (also sometimes referred to as tokens) are very useful in the creation of customized messages. Variables are most often used in paragraphs within the body of a message but they can also be inserted in the To, Cc, Bcc, and Subject fields.

When creating message templates, you can select variables from a list of standard variables. Standard variables are provided with the system and represent a specific value in the database. For example, if inserting the {Requisition.JobTitle} variable, the message would display the actual requisition title when the message is sent. or you can create custom variables.

If you do not find the variables you need in the list of standard variables, you can create custom variables by following these rules:

• Custom variables must be enclosed in curly braces { }.
• Custom variables must contain valid characters: capital letters (A-Z), numbers (0-9) and the underscore symbol (_).
• Custom variables must contain no spaces.

Custom variables should only be used in messages sent manually since user intervention is required to replace the variables by text strings just before the message is sent. Note that in the case of eShare, there is no interface presented to the user to make such edits, and as such any custom variables that are contained in a message template will not resolve and will display a blank space.

Messages can contain variables associated to user-defined fields (UDFs). Messages will resolve UDFs even if these UDFs are restricted from the user's view access. You should refrain from inserting sensitive data in message templates if you do not want a user to be able to see such information while sending the correspondence.

Standard field viewing permissions are honored when a user sends a manual correspondence. In such cases, fields are not exposed or included in the message sent if the user sending the message is not authorized to view the field.

⚠️ If not desired for display, users should be advised to remove unresolved variables prior to sending a printed/faxed correspondence. If variables are not resolved, they will appear as unresolved vs. being hidden in the printed file. This precaution is not necessary when sending a correspondences via e-mail.

For a list of variables, see the table List of Variables at the end of the correspondence chapter. For the most current list of variables, you can go to the Paragraphs feature in the Recruiting Administration menu.

Editable Message Templates

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Data Security in Correspondence

Data security is handled for correspondence sent manually by Recruiting Center users as well as correspondence sent automatically by the system.

For correspondence sent manually by a Recruiting Center users:

- The data that can be included in the message body and that is rendered in the message preview as well as in the outgoing message is constrained to data that the message sender is authorized to view.
- The security level of user-defined fields (UDFs) is not considered when a user sends a message. These fields still appear to the message sender even if the user is not able to otherwise view such data. It is therefore recommended to not use confidential UDFs in message templates where exposure to this data may cause concern.
- If a user is not authorized to view a field that is included in a correspondence, the field will be blank both for the message sender as well as the message recipient. Fields may not be visible because the field is at a security level that the user is not authorized to view or the field is a Passport field and the user is not able to view that type of service result. If a user tries to print a correspondence, the variables will render and appear unresolved rather than being stripped out.

For correspondence sent automatically by the system:

- The visibility of data is set according to the message recipient's permissions. If the message recipient is a candidate or referrer, there is no restriction. If the message recipient is a Recruiting Center user, the message is sent according to the restricted security profile.
- UDFs are not considered when messages are sent. Regardless of message recipients or senders viewing permission, UDF variables are always resolved.

When viewing sent messages in the candidate file History tab, these messages and their content are always visible to users, provided they are able to view the candidate file History tab in the context where the message was sent. For this reason, any message containing confidential data that may appear on a candidate file History tab and that needs to be protected should have the "confidential" property set on the message template. This will limit access to view the message to only users who can view confidential messages. All other users will simply see the line item indicating that the message was sent but will not be able to click the file to view the actual message content.

Since the 10 SP3 release, enhancements to the way security is handled in correspondence have brought a change in behavior regarding selected recipients. For automatic message templates, the system will send the message to the recipient audience identified on the message template as configured in the Correspondence Manager, as well as any other recipients indicated in the message header fields (To/Cc/Bcc). To enable customized notifications to users, an exception exists for automatic messages triggered by the Candidate Selection Workflow Context triggering event (Configuration > [Recruiting] Message Templates > Context). For this trigger only, the system will behave differently. Messages sent automatically by the Candidate Selection Workflow Context triggering event will be sent to the recipient if the selected recipient audience is either "External Candidates" or "Internal Candidates;" otherwise, for all other audiences the system will only deliver the message to those recipients identified in the message header fields (see table below). As with all automatic messages sent by the system, Recruiting Center user recipients will only receive messages with tokens resolved for General or Restricted fields, while messages sent to Candidate and Referrer recipients will resolve confidential tokens. Be sure to

<table>
<thead>
<tr>
<th>Message Template</th>
<th>Product</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unsolicited Email Application Acknowledgement, Candidate</td>
<td>Recruiting</td>
</tr>
<tr>
<td>Unsolicited Referral, Agent</td>
<td>Recruiting</td>
</tr>
<tr>
<td>Workflow Event Notification</td>
<td>Recruiting</td>
</tr>
</tbody>
</table>

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consider this point when configuring messages triggered by the Candidate Selection Workflow Context triggering event.

<table>
<thead>
<tr>
<th>Recipient</th>
<th>Automatic triggering event</th>
<th>Delivered to the recipient?</th>
<th>Delivered to the recipients defined in the To, Cc, and Bcc fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>All candidates</td>
<td>Candidate Selection Workflow Context</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Internal candidates</td>
<td>Candidate Selection Workflow Context</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>External candidates</td>
<td>Candidate Selection Workflow Context</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Referrer</td>
<td>Candidate Selection Workflow Context</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Agent</td>
<td>Candidate Selection Workflow Context</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Recruiting User</td>
<td>Candidate Selection Workflow Context</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Message Template Configuration

Creating a Message Template

The creation of message templates consists of the following steps.
1. **Defining the message properties.**
2. **Defining the message context.**
3. **Adding paragraphs to the message template or creating new paragraphs.**
4. **Ordering paragraphs in the message template.**
5. **Adding an attachment to the message template.**
6. **Activating the message template.**

Defining the Message Properties

**Prerequisite**
The *Access Correspondence Manager configuration* user type permission is required.

*Configuration > [Recruiting] Message Templates*

**Steps**
1. Click Create.
2. Enter a code, a name, and a description.
3. Select the message format.
4. Select a delivery type.
5. Specify if the message is confidential.
6. Complete fields in the message header by adding variables.
   a) Scroll the list of variables to find the desired variable. To display a short list of variables matching a specific keyword, you can enter the keyword in the Available Variables field. For example, entering candidate would display all variables containing the word candidate.
   b) In the list of variables, select the variable (including curly braces) with your cursor.
   c) Drag the variable in the desired location.
7. Click Save.

Defining the Message Context

**Prerequisite**
The *Access Correspondence Manager configuration* user type permission is required.

*Configuration > [Recruiting] Message Templates*

**Steps**
1. In the message template, click Edit next to Context.
2. Select the recipients.
3. Select the delivery type.
   If selecting the automatic delivery, select the triggering event.
If selecting the manual delivery, indicate if the message template will be available for all candidate selection workflows or for a specific workflow, step or status.

4. Associate the message template to an Organization, Location, Job Field.
5. Click Save.

Adding a Paragraph to the Message Template

**Prerequisite**

The *Access Correspondence Manager configuration* user type permission is required.

The paragraph must be created and activated.

*Configuration > Message Templates*

**Steps**

1. In the message template, click Add next to Paragraphs.
2. Select one or several paragraphs.
3. Click Select.

**Result**

The paragraph appears in the Paragraphs section of the message template.

Creating a Paragraph for the Message Template

**Prerequisite**

The *Access Correspondence Manager configuration* user type permission is required.

*Configuration > Message Templates*

**Steps**

1. In the message template, click Create next to Paragraphs.
   
   A message appears asking you if you want to add the new paragraph in the paragraph library so that it can be reused in other message templates.
2. Enter a name and a code.
3. Type the content of the paragraph in the Text box. You can add variables in the text and format the text using the RTF Editor options.
4. Click Save.

**Result**

The paragraph appears in the Paragraphs section of the message template.

Ordering Paragraphs in the Message Template

**Prerequisite**

The *Access Correspondence Manager configuration* user type permission is required.

*Configuration > Message Templates*

**Steps**

1. In the message template, click Reorder next to Paragraphs.
2. Select a paragraph you want to move to a different position.
3. Use arrows to move the paragraph.
4. Click Save.

Adding an Attachment to the Message Template

Prerequisite
The Access Correspondence Manager configuration user type permission is required.
By default, the attached file maximum size is 1 Mb (setting Attached File Maximum Size).
By default, the maximum number of file attachments allowed per entity record is 10 (setting Attached File Maximum Number).

Configuration > Message Templates

Steps
1. In the message template, click Add next to Attachments.
2. Enter a code.
3. Click Browse... to select a document.
4. Click Save.

Result
The attachment appears in the Attachments section of the message template if the size is below or equal to the maximum size allowed for attachments.

Activating the Message Template

Prerequisite
The Access Correspondence Manager configuration user type permission is required.
The message template must have an Inactive or Draft status.

Configuration > Message Templates

Steps

In the message template, click Activate.

Result
The status of the message template is Active and is now available to Recruiting Center users when they send messages.

Sending Messages to a Corporate Email Address

Email messages sent with the Correspondence Manager in the Recruiting Center, the Transitions Center and Career Sections can be sent to a corporate email address.

Some customers need to send all correspondences to a corporate inbox in order to keep a copy of all the messages that were sent.

A setting was created to allow the configuration of a corporate email address. This corporate email address will automatically be added to the Bcc field of a message template (but will be hidden to users) and a copy of all email messages will be sent to that email address. The correspondences that are archived are those sent to all candidates, internal candidates, and external candidates.
Configuration

To send all email messages to a corporate email address, system administrators must configure this setting by adding an email address.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bcc address in Correspondence Manager</td>
<td>Email address added to the Bcc field of all Recruiting, Career Section and Transitions emails sent through the Correspondence Manager.</td>
<td>Configuration &gt; [Configuration] Settings</td>
</tr>
</tbody>
</table>

When creating a message template, if a value is entered in the Bcc field, the email message will be sent to the Bcc field recipient as well as to the email address entered in the new Bcc setting.

Message Template - Permissions and Settings

The following permissions and settings are used to configure message templates and correspondence.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Correspondence Manager configuration</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Administration</td>
</tr>
<tr>
<td>Send correspondence (using the Send Correspondence action)</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Candidates</td>
</tr>
<tr>
<td>Send correspondence (while changing the status of a candidate in a workflow)</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Candidates</td>
</tr>
<tr>
<td>Customize messages before sending (using the Send Correspondence action)</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Candidates</td>
</tr>
<tr>
<td>Customize messages before sending (while changing the status of a candidate in a workflow)</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Candidates</td>
</tr>
<tr>
<td>Send messages created from scratch (using the Send Correspondence action)</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Candidates</td>
</tr>
<tr>
<td>Send messages created from scratch (while changing the status of a candidate in a workflow)</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Candidates</td>
</tr>
<tr>
<td>View confidential messages</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Candidates</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Correspondence Manager Search Order</td>
<td>When two or more message templates are equally relevant, select the nearest match based on order specified here.</td>
<td>By Job, By Location, By Organization</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Setting</td>
<td>Description</td>
<td>Default Value</td>
<td>Location</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>---------------</td>
<td>-----------------------------------------------</td>
</tr>
<tr>
<td>Display &quot;Reply To&quot; Field</td>
<td>Indicates whether or not to display the &quot;Reply To&quot; field.</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Email Attachment Extension</td>
<td>Used to specify the extensions to be used for email attachments (0=No Attachment, 1=HTML, 2=HTM, 3=HTML+HTM, 4=HTM+HTML).</td>
<td>1 = HTML</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Email Type Sent to Users</td>
<td>Determines the type of email type sent to users of Recruiting Center (HTML or plain text).</td>
<td>HTML</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Sender Email Address</td>
<td>Default email address used in the system-generated emails sent to the users.</td>
<td>hr-empty@<a href="mailto:invalid@email.com">invalid@email.com</a></td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Sender Email Address Alias</td>
<td>Name assigned to the email sender. Aliases are multilingual, but if no value is provided in a given language, the English value is used by default.</td>
<td></td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Bcc address in Correspondence Manager</td>
<td>Email address added to the Bcc field of all Recruiting, Career Section and Onboarding (Transitions) emails sent through the Correspondence Manager.</td>
<td></td>
<td>Configuration &gt; [Configuration] Settings</td>
</tr>
<tr>
<td>Attached File Maximum Number</td>
<td>The maximum number of file attachments per entity record allowed.</td>
<td>10</td>
<td>Configuration &gt; [Configuration] Settings</td>
</tr>
<tr>
<td>Attached File Maximum Size</td>
<td>Maximum size of a file attachment (in bytes) allowed.</td>
<td>1 Mb</td>
<td>Configuration &gt; [Configuration] Settings</td>
</tr>
</tbody>
</table>
Message Template - Other Configuration Tasks

Editing the Properties of a Message Template

Prerequisite

The Access Correspondence Manager configuration user type permission is required.

It is a best practice to deactivate the message template before modifying a message template. When edits are completed, the message template should be reactivated.

Configuration > Message Templates

Steps

1. Click Message Templates.
2. Click a message template.
3. Click Edit next to Properties.
4. Modify the information.
5. Click Save.

Result

Modifications made to the code, name, description, message format and message header variable(s) used in the message are automatically reflected in messages sent using this template.

Duplicating a Message Template

Prerequisite

The Access Correspondence Manager configuration user type permission is required.

Configuration > Message Templates

Steps

1. Click Message Templates.
2. Click Duplicate next to the desired message template.
3. Make required changes.
4. Click Save.

Result

The message template appears in the Message Templates list.

Deactivating a User-Defined Message Template

Prerequisite

The Access Correspondence Manager configuration user type permission is required.

The message template must have the Active status.

Configuration > Message Templates
Steps
1. Click Message Templates.
2. Click a message template.
3. Click Deactivate.

Result
The status of the message template is Inactive. The template can no longer be used by Recruiting Center users to send messages, but the template is not permanently deleted from the database.

Deleting a Message Template

Prerequisite
The Access Correspondence Manager configuration user type permission is required.

Configuration > Message Templates

Steps
1. Click Message Templates.
2. Click Delete next to the desired message template.
3. Click Yes.

Result
The message template is permanently deleted from the database.

Removing an Attachment from a Message Template

Prerequisite
The Access Correspondence Manager configuration user type permission is required.

Configuration > Message Templates

Steps
1. Click Message Templates.
2. Click a message template.
3. Click Remove next to the attachment.

Result
The attachment no longer appears in the Attachments section of the message template.

Editing a Paragraph in a Message Template

Prerequisite
The Access Correspondence Manager configuration user type permission is required.
Deactivate the message template before modifying a paragraph.
Note that any edits will affect all templates that use the paragraph, so edit with care. User may chose to duplicate the paragraph and then edit the new version only.
Configuration > Message Templates

Steps
1. Click Message Templates.
2. Click a message template.
3. In the Paragraphs section, click Edit next to the paragraph.
4. Modify the information in the fields.
5. Click Save.

Previewing a Paragraph in a Message Template

Prerequisite
The Access Correspondence Manager configuration user type permission is required.
You must be in the active language of the message template.

Steps
1. Click Message Templates.
2. Click a message template.
3. Click Preview.

Activating a Paragraph in a Message Template

Prerequisite
The Access Correspondence Manager configuration user type permission is required.
The paragraph must have the Inactive status.

Steps
1. Click Message Templates.
2. Click a message template.
3. In the Paragraphs section, click the paragraph.
4. Click Activate.

Result
The status of the paragraph is Active and is now available for selection when adding a paragraph in a message template.

Deactivating a Paragraph in a Message Template

Prerequisite
The Access Correspondence Manager configuration user type permission is required.
The paragraph must have the Active status.

Steps
1. Click Message Templates.
2. Click a message template.
Steps
1. Click Message Templates.
2. Click a message template.
3. In the Paragraphs section, click a paragraph.
4. Click Deactivate.

Result
The status of the paragraph is Inactive and the paragraph can no longer be selected in a template. The paragraph is not permanently deleted from the database.

Adding a Variable in a Message Template

Prerequisite
Configuration > Message Templates
Configuration > [Product] Message Templates

Steps
1. Select a message template.
2. To add a variable in the To, Cc, Bcc, and Subject fields, click Edit next to Properties.
3. To add a variable in a paragraph, click a paragraph.
4. Scroll the list of variables to find the desired variable.
   - To display a short list of variables matching a specific keyword, you can enter the keyword in the Available Variables field. For example, entering candidate would display all variables containing the word candidate.
   - To display the complete list of variables, simply remove the keyword you entered.
5. In the list of variables, select the variable (including curly braces) with your cursor.
6. Drag the variable in the desired location.

Result
When sending the message, the variable is replaced by contextual data.

The system may be unable to replace a variable because:

- The data is missing; the variable placeholder will be left blank.
- The variable is invalid in the context; the variable will be replaced by a blank for automatically sent messages.
- For manually sent messages, the variable will be left blank.

Uploading Company Logos for Message Templates

Prerequisite
The logo must respect the following criteria:

- Must be a .GIF file.
- Must have the desired size as it will not be resized by Taleo. Maximum size allowed is 300 KB.
- A maximum of 30 logos can be uploaded.
- After upgrading to version 13A, the current logos will not show in the settings themselves but they are still available in the zone.
Configuration > [General Configuration] Settings

Steps
1. In the Refine by list, select Category, then Corporate Branding, and click Refresh.
2. Select one of the Custom Correspondence Logo setting.
   For example, Custom Correspondence Logo 01.
3. Click Edit.
4. Click Browse to select an image.
5. Click Save.

Result
The company logo is now available to be added in message templates. To preview your logo after it has been uploaded, access this link and replace ZONENAME by the proper zone name and XX by the actual logo id (01 to 30) http://ZONENAME.taleo.net/custom/images/company_logo_XX.gif

When changing an existing company logo, the logo is updated everywhere, including past offer letters. In an offer letter, the logo is saved as a link to the logo. As a result, changing the logo will also update the logo in past offer letters. A workaround would be to upload a new logo using another Custom Correspondence Logo setting instead of changing an existing logo setting.

Adding a Company Logo in a Message Template

Prerequisite
Configuration > Message Templates
Configuration > [Recruiting] Message Templates

Steps
1. Select a message template.
2. To add a company logo in a paragraph, click on a paragraph.
3. Click Edit next to Properties.
4. Scroll the list of variables to locate the variables called {Other.CompanyLogos}. There are 30 variables for logos.
5. Select the variable (including curly braces) with your cursor.
   For example, select {Other.CompanyLogos1}.
6. Drag the variable in the desired location in the Text box.
7. Click Save.

Result
When the message is sent, the variable is replaced by the company logo that was uploaded in one of the Custom Correspondence Logo setting.

Allowing Candidates to Reply Directly to a Message

Prerequisite
The Access Correspondence Manager and Message templates user type permissions are required.
The Display "Reply To" Field setting must be enabled (Recruiting Settings).

**Configuration**

**Steps**

1. Click Message Templates for the desired product.
2. Click Edit.
3. In the Reply To field, enter the email address of the recipient that you want to allow to reply to the message.
   Alternatively, you can copy a variable from the Variables list and paste it into the Reply To field.
4. Click Save.

**Result**

The Reply To field is displayed in the Correspondence Wizard in the Recruiting Center. If users have the permission to edit messages, they can edit the address displayed in the Reply To field. When candidates receive the email message, they have the option of clicking Reply in their email reader and the message is sent to the address you indicated in the Correspondence Manager.
Notifications

Notification

A notification is an e-mail message automatically sent by the system to notify Recruiting Center and eShare users of key workflow events affecting the recruiting and hiring cycle.

The system administrator can choose whether to send or not send an e-mail for a given triggering event. For example, notifications can be sent for:

- Job posting
- Approval process
- End of sourcing
- Candidate selection (when a candidate applies, starts or completes an interview step, when an offer is made, etc.)
- Requisition being closed
- Requisition being put on hold

When the system administrator chooses to send a notification, the system automatically chooses the message template with the corresponding triggering event.

eShare approval request (offers and requisitions) e-mails have an expiration date of 30 days. This date cannot be changed, but permitted users can resend a stalled approval request.

Job Posting Notification

In the Recruiting Center, in the requisition file Posting and Sourcing tab, when the Email this job posting to matching candidates option is selected, the system matches all the candidates that have the Required criteria to the requisition being posted. Candidates who have all the Required criteria will receive an email inviting them to apply on the job that is posted.

To receive this Job Posting Notification, the candidate must:

- Have selected "Please email job postings" in the candidate profiler.
- Have a valid email address.
- Have not yet applied on the requisition.
- Have not yet been invited to apply on the requisition.
- Match the selections marked as required in the requisition.

If the requisition is posted on at least one external career section (whether or not it is posted on an internal career section), all the candidates who match the Required criteria will receive a Job Posting Notification.

If the requisition is posted only on an internal career section, only the internal candidates will receive a Job Posting Notification.

Workflow Event Notification

Workflow Event Notifications (WEN) are typically sent when the status of a requisition changes, during an approval process, or when there is a new applicant on a requisition. This notification is sent to the Recruiter, the Recruiter Assistant, the Hiring Manager and the Hiring Manager Assistant. Note that a user who is both the Recruiter and the Hiring Manager of a requisition may receive duplicate notifications for a given candidate. Workflow Event Notifications (WEN) are configured under Configuration > Recruiting Administration > Notifications. See the list of workflow event notifications.

For security reasons, the candidate file is not attached to the notification e-mails. Instead, these e-mails can be configured to include a "deep link" variable that gives deep link access to the candidate file. (Note that no
configuration is required for newer customer implementations because the Workflow Event Notification message template already includes the variable).

The `{Candidate.CandidateSubmissionUrl}` variable can be added to the standard Workflow Event Notification message template or other message templates if desired. When receiving the notification, users must click the hyperlink contained in the message to access the candidate file (note that users must be authenticated, either by signing in or with Single Sign-On). The candidate file is no longer included in the message. The variable is available for use in any message template; however, if placed in a context where there can be no referenced job submission, the link will not work.

Note that if users have the required permission, they can control via the My Setup feature if they want to be kept informed of workflow events by email.

**New Entry Event Notifications (NEEN)**

New Entry Event Notifications (NEEN) are configured in a specific step or status of a Candidate Selection Workflow (CSW) to notify the recipient(s) when a new candidate enters this specific step or status. This notification is sent to the Recruiter Assistant and/or Hiring Manager Assistant if they exist, otherwise to the Recruiter and/or Hiring Manager. Note that two notifications can be received by a single recipient if it is configured at both the step and the status level reached by a candidate.

### Notification - Settings

The following settings are used to configure notifications.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workflow Event Notification</td>
<td>Keep the user informed of workflow events by email.</td>
<td>By Job, By Location, By Organization</td>
<td>Configuration &gt; [General Configuration] Settings</td>
</tr>
<tr>
<td>Job Posting Notification (Internal Candidates)</td>
<td>Email job postings to matching internal candidates.</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>User Account General Preference</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workflow Event Notifications</td>
<td>For the Workflow Event Notifications feature to be available to Recruiting Center users, the system administrator must activate it in the user account's general preferences. Once activated, users with access to the My Setup feature in the Recruiting Center can update their preferences and override the value selected by the system administrator.</td>
<td>Yes</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Accounts &gt; General Preferences</td>
</tr>
</tbody>
</table>
# Workflow Event Notifications

The following table presents the criteria under which a workflow event notification can be triggered. These criteria are available under Recruiting Administration > Notifications.

<table>
<thead>
<tr>
<th>Notification</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Approval Process Notification</strong></td>
<td>Send notification about the approval process</td>
</tr>
<tr>
<td></td>
<td>• Every time an approval event (decision or termination) occurs</td>
</tr>
<tr>
<td></td>
<td>• But not if the user chooses to pass</td>
</tr>
<tr>
<td></td>
<td>• Only when final (the status changes to Approved or Rejected)</td>
</tr>
<tr>
<td></td>
<td>• But not if the approval is granted</td>
</tr>
<tr>
<td></td>
<td>Notifications for a requisition approval event</td>
</tr>
<tr>
<td><strong>Posting Notification</strong></td>
<td>Send notification about new postings</td>
</tr>
<tr>
<td></td>
<td>• Only for the first posting</td>
</tr>
<tr>
<td></td>
<td>• For every new posting</td>
</tr>
<tr>
<td></td>
<td>Notifications for a sourcing event</td>
</tr>
<tr>
<td><strong>End of Sourcing Notification</strong></td>
<td>Send notification when sourcing ends</td>
</tr>
<tr>
<td></td>
<td>• But only if it has expired</td>
</tr>
<tr>
<td></td>
<td>Send notification when posting is about to expire</td>
</tr>
<tr>
<td></td>
<td>Notification for a sourcing event</td>
</tr>
<tr>
<td></td>
<td>Notification for an expired posting</td>
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<tr>
<td></td>
<td>Notification for a posting about to expire</td>
</tr>
<tr>
<td><strong>Candidate Selection Notification</strong></td>
<td>Send notification when candidates apply</td>
</tr>
<tr>
<td></td>
<td>• But only if they have all the required criteria</td>
</tr>
<tr>
<td></td>
<td>• But only if they are an ACE candidate</td>
</tr>
<tr>
<td></td>
<td>• Do not notify users to whom an ACE candidate alert is sent</td>
</tr>
<tr>
<td></td>
<td>Send notification when a candidate starts or completes an Interview</td>
</tr>
<tr>
<td></td>
<td>step</td>
</tr>
<tr>
<td></td>
<td>Send notification when an offer is made</td>
</tr>
<tr>
<td></td>
<td>Send notification when a candidate is hired</td>
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<tr>
<td></td>
<td>Notifications for a workflow event</td>
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<tr>
<td><strong>Requisition Closing Notification</strong></td>
<td>Send notification when a requisition closes</td>
</tr>
<tr>
<td></td>
<td>• But only if it is canceled</td>
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<tr>
<td></td>
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<tr>
<td><strong>Requisition On Hold Notification</strong></td>
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</tr>
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</table>
### Activating a Notification

**Prerequisite**

*Configuration* > [Recruiting] Administration > Notifications

**Steps**

1. Select the desired notifications and related options.
2. Click Save.

For notifications configured in the Notifications feature of the Recruiting Administration menu, the user account preference must indicate if the user wishes to receive workflow notifications. For all other correspondence messages configured within the correspondence manager, the user will receive messages regardless of the configured notifications preference.

**Result**

The notifications are enabled. E-mails will be sent automatically by the system when selected notifications and options are met.

**Next Step**

In SmartOrg, activate the user preference in user accounts entitled *Workflow Events Notification*. E-mails will be sent automatically when selected notifications and options are met.

### Including a Deep Link Variable in a Workflow Event Notification

**Prerequisite**

*Configuration* > [Recruiting] > Message Templates

**Steps**

1. Locate the Workflow Event Notification message template.
2. In the Paragraphs section, click on the paragraph entitled Standard notification for a workflow event.
3. Click Edit next to Properties.
4. In the Available Variables field, locate the \{Candidate.CandidateSubmissionUrl\} variable.
5. Convert the variable into a hyperlink.
   a) Select the text that will contain the hyperlink to the file.
   b) Click ![Hyperlink](image)
   c) Select URL in the Link Type field, select Other in the Protocol field, "and type \{Candidate.CandidateSubmissionURL\} in the URL field.
   d) Click OK.

**Result**

The paragraph now contains the hyperlink that will take the recipient directly to the candidate’s submission.
**Next Step**

You can follow the same steps to add the variable to other paragraphs.
Message Center

Secure Message Delivery

Customers who wish to have increased control over the information sent to Career Section users via email may choose to enable the Secure Message Delivery feature. When enabled, all messages are delivered to a secure Message Center accessible from any of the customer's Career Sections. Message recipients are directed to the Message Center to retrieve their messages.

The Secure Message Delivery feature applies only to messages sent to Career Section users, that is candidates, agents, and referrers. It does not impact Recruiting Center users or messages sent with other Taleo products.

If a message is sent via email (whether it is an automated message or the sender selected to send it via email), rather than receiving the actual message via email the message recipient receives a notification of message delivery containing a deeplink. To receive a notification of message delivery, message recipients must have a valid email address on file and the notification template message must be active.

All messages sent to a single email address will be accessible from any Secure Message Center that is linked to that email. This may cause candidates to see one another’s message content, just as though they were receiving messages via a shared inbox. If this is not desired, then the Email Uniqueness setting should be changed (Configuration > [Recruiting] Settings).

To access the Message Center, the message recipient clicks on the deep link in the message and must then authenticate himself by entering a user name and password. If the user does not yet have an account, he must create one prior to be able to access his messages. Alternatively, the Message Center can be directly accessed via any active Career Section by clicking the My Messages tab.

Once in the Message Center, the message recipient can read his messages, delete them, and download the files attached to the messages in order to view them. Before accessing an attachment, the recipient must accept a download agreement. Messages are displayed in a print friendly format should Career Section users wish to print a message using the browser's print functionality.

When viewing a specific message, the recipient can navigate from one message to the next without returning to the list view by using the Previous or Next links. The message may also be deleted. Clicking Back returns the user to the message list.

For Career Section users who do not have an email address, the message sender can still send them messages and these users can access their messages from within the Message Center. For example, a candidate exists in the system and did not supply an email address. A recruiter will still be able to send an email message to the candidate using the Recruiting Center correspondence wizard.

The Message Center

The Message Center has the same look and feel as the Career Section; it adopts the theme and branding of the Career Section. Messages inside the Message Center retain the formatting attributes of the message template.

The Message Center language matches the language from where the Message Center was originally accessed. If the user is coming from a Career Section, the Message Center is presented in the same language as the Career Section. If coming from the deeplink contained in the notification, the Message Center is presented in the same language as the notification sent to the user. Messages inside the Message Center are in the language used to transmit the message.

Help text is displayed in the right-hand side of the Message Center. Default universal help text, which can be edited via TexTool, is provided by Taleo. If desired, the text can be customized by a Career Section administrator.
using the Career Portal Page user-defined labels feature. This text change only affects the Message Center on that particular Career Section.

The Message Center stores messages sent within the past 6 months to a maximum of 100 messages. If more than 100 messages have been delivered, only the most recent 100 messages are accessible.

Messages that do not have a subject cannot be opened from the Message Center.

When the Message Center is enabled, the "To", "Cc", and "Bcc" fields in the message header are not available when sending correspondence; therefore, Recruiting Center users cannot edit the message recipients. Also, Recruiting Center users cannot add additional recipients while manually sending a correspondence.

When Recruiting Center users are resending messages from the candidate file History tab, the system will replicate the method of delivery used for the original message. If a message was sent prior to enabling the Message Center, when the user chooses to resend such a message, the system will not deliver the resent message to the Message Center, it will send the message to the original email address.

### Configuring the Secure Message Delivery Feature

The configuration of the secure message delivery feature consists of enabling a setting and configuring message templates.

System administrators may choose to disable the "Email me a copy" link displayed on the Summary page of individual Career Sections. This can be done at any time while the Career Section is not active. If this option is not disabled before the Message Center is enabled, then the full email version of the candidate submission may be delivered via email, it is not sent to the Message Center.

<table>
<thead>
<tr>
<th>Career Section Property</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display the &quot;Email me a copy&quot; link in the Summary page</td>
<td>No</td>
<td>Configuration &gt; [Career Section] Administration &gt; Career Sections &gt; Properties</td>
</tr>
</tbody>
</table>

The Secure Message Delivery Enabled setting allows customers to choose if they want to send messages to Career Section users via email or via the secure Message Center.

- When set to Yes, the Message Center is enabled and messages to Career Section users are delivered via the Message Center. Career Section users receive a notification of delivery and need to access the Message Center to view the content of their messages.
- When set to No, there are no changes in the way the system sends messages. Career Section users will receive messages by email.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Secure Message Delivery Enabled</td>
<td>Indicates whether the secure message delivery feature is activated in the system.</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Settings</td>
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</table>

Three message templates are available. They are used to inform Career Section users that they have received a message and that they can view it by clicking a deeplink giving access to the Message Center. A unique message exists by recipient audience. These message templates are active by default. They can be configured just like any other message templates. System administrators can customize the message body and include tokens. Note that the following tokens containing the OR logic will resolve as follows:
• `{Candidate.EmailOrOperatorEmail}`: message sent to the candidate’s Message Center, never to the operator.
• `{Agent.EmailOrBlank}`: looks for an agent email. However, if blank it means that there is no agent. In this case, there is no Message Center to send it to and the email address will resolve to be blank.

<table>
<thead>
<tr>
<th>Message Template</th>
<th>Location</th>
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<tbody>
<tr>
<td>Message Center Delivery Notification, Agent</td>
<td>Configuration &gt; [Recruiting] Message Templates</td>
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<tr>
<td>Message Center Delivery Notification, Candidate</td>
<td>Configuration &gt; [Recruiting] Message Templates</td>
</tr>
<tr>
<td>Message Center Delivery Notification, Referrer</td>
<td>Configuration &gt; [Recruiting] Message Templates</td>
</tr>
</tbody>
</table>

The following messages are delivered directly to the candidate via email regardless of the Message Center being enabled or not:

• Forgot User Name
• Forgot Password
• Candidate Account Locked
• Job Specific Referral - New Candidate
• Job-Specific Capture Resume Acknowledgment - New Candidate
• Unsolicited Capture Resume Acknowledgment
• Unsolicited Referral - New Candidate
• Resume Parsing Service Unavailable - Candidate
• Unsolicited Email Application Acknowledgment - Candidate
• Standard notification for a self-registration
• All messages sent to Recruiting Center user accounts
• All Onboarding messages
### List of Variables

For the most current list of variables, you can go to the Paragraphs feature in the Recruiting Administration menu.

<table>
<thead>
<tr>
<th>Variable Type</th>
<th>Variable</th>
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<tr>
<td>Agent</td>
<td>{Agent.Email}</td>
</tr>
<tr>
<td>Agent</td>
<td>{Agent.EmailOrBlank}</td>
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<tr>
<td>Agent</td>
<td>{Agent.Fax}</td>
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<tr>
<td>Agent</td>
<td>{Agent.FirstName}</td>
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<td>{Agent.FullName}</td>
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<td>Agent</td>
<td>{Agent.HomePhone}</td>
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<td>{Agent.LastName}</td>
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Source Tracking

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Sources and Events

A source is a medium or event through which a candidate has heard about a job.

Sources may be as diverse as Internet job boards, job fairs, magazines, specialized trade publications, newspapers, professional associations, mailing lists, recruiting agencies, etc. Events are used to track down which event, banner, or campaign are attracting the most candidates to career sections. An event can be a specific advertisement in a trade magazine, a recruiting event on a university campus (job fair), or a special recruiting event at an organization.

In the Recruiting Center, sources are displayed in the requisition Posting and Sourcing tab. When users create a requisition, only the sources that have the same Organization-Location-Job Field structure as the requisition are displayed in the Sources list. Users can modify the list of sources associated to the requisition. If event tracking was enabled, users have the ability to access the list of events related to a source. Once in the Events list, users have the ability to add, modify and delete events in the requisition.

Source Tracking

Source tracking allows Recruiting Center users to know how a candidate has heard about a job.

There are three levels of source tracking:

<table>
<thead>
<tr>
<th>Level</th>
<th>Element</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Source Type</td>
<td>General source</td>
<td>Newspaper</td>
</tr>
<tr>
<td>2</td>
<td>Source</td>
<td>Specific source</td>
<td>Boston Globe</td>
</tr>
<tr>
<td>3</td>
<td>Event</td>
<td>Timely event for a source</td>
<td>An add in the Boston Globe on Sunday</td>
</tr>
</tbody>
</table>

Whether for budgeting purposes or to make better decisions as to where to post jobs, data on the performance of each source is crucial. Your organization needs to know, among other things, how many candidates applied through each source.
Configuring Source Tracking

The configuration of the source tracking feature consists of the following steps.
1. Creating a source.
2. Creating an event.
3. Adding the Source Tracking block in the candidate file.
4. Adding the Source Tracking block in the career section application flow.
5. Hiding the Source Tracking block if it is pre-filled.

Creating a Source

Prerequisite
Before creating a source, check if it is not already available in the database.
Only user-defined sources can be created.
The Access Source Tracking configuration user type permission is required.

Steps
1. In the Corporate Sources tab, click New...
2. Complete the fields by following the instructions of the Source Creation Wizard.
   For details on the fields, see Source Properties.
3. Click Finish.

Result
The source is displayed in the Corporate Sources list. It is available to candidates when they apply for a job.

Creating an Event

Prerequisite
The source must be created.
The Tracking Mode setting must be set to Event.
The Access Source Tracking configuration user type permission is required.

Steps
1. On the Corporate Sources tab, click the number in the Events column next to a source.
2. Click New...
3. Complete the fields.
   If using the event for an online campaign and wanting to have it automatically default in for the candidate, the ID info needs to be put into the URL.
4. Click Done.

Result
The event appears in the Events list of the source. Candidates will be able to select this event in the Career Sections.

Adding the Source Tracking Block in the Candidate File

Prerequisite
The user-defined file must have the inactive or draft status.
At least one section must be created in the user-defined file.

Steps
1. Click a user-defined file of type Candidate File.
2. Click Edit next to Section Ordering.
3. Enter the name of the Source Tracking section in the Add a Section field.
4. Click Create Section.
5. Select the Source Tracking block in the Available Blocks section, and drag and drop it to the Source Tracking section you created.
6. Click Save.

Adding the Source Tracking 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.

Steps
1. Click an application flow.
2. Click Edit.
3. Enter the name of the Source Tracking section in the Add a Page field.
4. Click Create a Page.
5. Select the Job Sourcing Tracking in the Available Blocks section, and drag and drop it to the Source Tracking section you created.
6. Click Save.

Hiding the Source Tracking Block if Pre-Filled

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. In the Page Ordering section, click the Source Tracking block.
3. Click Edit next to Properties.
4. Select Yes next to "Hide the "Source Tracking" block if it is pre-filled".
5. Click Save.

The Source Tracking block will be hidden and candidates will not be able to override the content.

**Source Properties**

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source Type</td>
<td>Source types are provided by Taleo. System administrators cannot add any additional source types, but they can change the Display Name of any of the source types. For a list of available source types, see <a href="#">Source Types</a>.</td>
<td>Configuration &gt; [Recruiting] Sources</td>
</tr>
<tr>
<td>Origin - System</td>
<td>System-defined sources are provided by Taleo and cannot be deleted from the database. However, they can be removed by system administrators. A source that has been removed from the sources list can be added again as it remains available in the database. If a source is removed from the sources list, it no longer appears to users in the Recruiting Center, unless users can access Taleo sources directly because they have been granted the <em>Select Taleo system sources in selector window</em> user type permission. The use of a system-defined source can be modified by system administrators, that is if the source is used in the profiler, in a requisition, in both, or in none.</td>
<td>Configuration &gt; [Recruiting] Sources</td>
</tr>
<tr>
<td>Origin - User</td>
<td>User-defined sources are created by system administrators. A user-defined source can be permanently deleted from the sources list, provided it is not being used. If a user-defined source is in use, deleting it will only inactivate it. The properties of a user-defined source as well as the Organization-Location-Job Field structure associated to it can be modified by system administrators even if the source is in use.</td>
<td>Configuration &gt; [Recruiting] Sources</td>
</tr>
<tr>
<td>Visibility</td>
<td>The visibility of a source can be set to internal or public. An internal source can be viewed only by Recruiting Center users. A public source can be viewed by candidates in Career Sections and by Recruiting Center users. The private setting &quot;Display Internal Source on Internal Career Sections&quot; allows customers to decide if they want the internal visibility sources to display on internal career sections. Contact Oracle Support for details on this setting.</td>
<td>Configuration &gt; [Recruiting] Sources</td>
</tr>
<tr>
<td>Use - In profiler or In requisition</td>
<td>A source can be used in a requisition source list (in requisition) and/or in a general profile source list (in profiler). If the use of a source is not defined, then the source will not automatically default into the source list for</td>
<td>Configuration &gt; [Recruiting] Sources</td>
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<tr>
<td>Element</td>
<td>Description</td>
<td>Location</td>
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<tr>
<td>-------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------------------------</td>
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<tr>
<td>the requisitions or the general profiles. However, via the Recruiting Center, a user can still add the source to a specific source list. The use of a source can be modified after it has been created.</td>
<td>Configuration &gt; [Recruiting] Sources</td>
<td></td>
</tr>
</tbody>
</table>
Source Tracking - Other Configuration Tasks

Adding a Source

Prerequisite
The Add option is used to select sources that are coming from a pre-defined list already linked to a source type and visibility.

The Access Source Tracking configuration user type permission is required.

Configuration > [Recruiting] Administration > Sources

Steps
1. In the Corporate Sources tab, clear the Show Sub-folder Contents option located in the left panel.
2. Click Refresh.
3. In the Corporate Sources tab, click Add…
4. Select a source.
5. Click Done.

Result
The source is displayed in the Corporate Sources list and is available in the Recruiting Center. Once the source is added, you can only modify the In Profiler and In Requisition options available in the Source Properties.

Removing a Source

Prerequisite
Only system sources can be removed.
The source must not be used in a requisition or candidate profile.
The Access Source Tracking configuration user type permission is required.

Configuration > [Recruiting] Administration > Sources

Steps
1. In the Corporate Sources tab, select a source.
2. Click Remove.

Result
The source is removed from the Corporate Sources list. Recruiting Center users can no longer use the source.

Deleting a Source

Prerequisite
Only user-defined sources can be deleted.
The source must not be used in a requisition or candidate profile.
The Access Source Tracking configuration user type permission is required.
Configuration > [Recruiting] Administration > Sources

Steps
1. In the Corporate Sources tab, click on a source.
2. Click Delete.

Result
If the deleted source was being used, it will only be deactivated. If the deleted source was not being used, then it is permanently deleted.

Reactivating a Source

Prerequisite
The Access Source Tracking configuration user type permission is required.
The source must be inactive.

Configuration > [Recruiting] Administration > Sources

Steps
1. In the Corporate Sources tab, select an inactive source.
2. Select Reactivate.

Editing the Properties of a Source

Prerequisite
The source must not be used in a requisition or candidate profile.
The Access Source Tracking configuration user type permission is required.

Configuration > [Recruiting] Administration > Sources

Steps
1. In the Corporate Source tab, click on a source.
2. Click Edit next to Source Properties.
3. Indicate where the source is used, either In Profiler or In Requisition.
4. Click Done.
5. If you selected In Requisition, you are asked if you want to add this newly added source to the list of requisitions that are Open or On Hold. If selecting No, then the source will not be added to existing requisitions, but will be added on any new requisitions where applicable.

Result
The use of a source is modified, i.e. if a source is required by users when creating a requisition or by candidates when entering their profile in a career section.

Editing the Organization-Location-Job Field of a Source

Prerequisite
The source must be a user-defined source.
The source must not be used in a requisition or candidate profile.

The Access Source Tracking configuration user type permission is required.

**Configuration > [Recruiting] Administration > Sources**

**Steps**

1. In the Corporate Source tab, click a source.
2. Click Edit next to Organization-Location-Job Field Classification.
3. Click Add to add Organization-Location-Job Field elements.
4. Click Remove or Remove All to remove Organization-Location-Job Field elements.
5. Click Done.

**Result**

When a source is contextualized to an Organization, Location, or Job Field, then the source will only default into the source list of requisitions that match the OLF contextualization.

**Editing an Event**

**Prerequisite**

The source must be created.

The properties of an event can be modified even if the event is used in a requisition or in a general profile.

The Tracking Mode setting must be set to Event.

The Access Source Tracking configuration user type permission is required.

**Configuration > [Recruiting] Administration > Sources**

**Steps**

1. On the Corporate Sources tab, click the number in the Events column next to a source.
2. Click an event.
3. Modify the information as needed.
4. Click Done.

**Removing an Event**

**Prerequisite**

The source must be created.

The Tracking Mode setting must be set to Event.

The Access Source Tracking configuration user type permission is required.

**Configuration > [Recruiting] Administration > Sources**

**Steps**

1. On the Corporate Sources tab, click the number in the Events column next to a source.
2. Select an event.
3. Click .
4. Click Yes to confirm your choice.
5. Click Done.

**Result**

The event no longer appears in the Events list of the source. Candidates will no longer be able to select this event in the Career Sections.
## Source Tracking - Permissions and Settings

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access source tracking configuration</td>
<td>A user must have this permission to configure the Source Tracking feature.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Administration</td>
</tr>
<tr>
<td>Access Posting and Sourcing</td>
<td>Gives Recruiting Center users access to the Posting and Sourcing tab in requisitions.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Sourcing</td>
</tr>
<tr>
<td>Select Taleo system sources in selector window</td>
<td>Allows Recruiting Center users to select Taleo system sources for a requisition.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Sourcing</td>
</tr>
</tbody>
</table>

Currently, if users do not have the "Select Taleo system sources in selector window" permission, they cannot add any sources to the list for the requisition. If they have the permission, they can add all sources, zone specific and system sources.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
</table>
| Already Answered Source Tracking Question | Ask applicant source only once within the same session.  
If set to Yes and the candidate has specified the source tracking in the session, then the candidate is not asked to specify the source a second time in the same session and the same source is used for subsequent submissions in the same session.  
If the browser closes or the candidate is logged off, the candidate needs to answer the source tracking question again. | Yes            | Configuration > [Recruiting] Settings |
| General Profile Source Tracking      | At every submission, update candidate profile with new source information.  
If set to Yes, the candidate’s General Profile source is updated with submission source after each new submission. | No             | Configuration > [Recruiting] Settings |
<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>If set to No, each new submission source will only be at the submission level and the candidate’s General Profile source will stay as it is, whether that is blank or a specific source.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tracking Mode</td>
<td>Enables the display of events in Source Tracking.</td>
<td>Event</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td></td>
<td>If set to Event, events can be created for each source. In the Corporate Sources list, an Event column is available.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>If set to Source, no events are available.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Source Tracking Questions Mandatory</td>
<td>If set to Yes, source tracking questions are mandatory in the Career Section.</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Source Tracking List Presented</td>
<td>Show the source type while capturing a source.</td>
<td>Yes</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td></td>
<td>If set to Yes, the Source Type is asked first, followed by the list of sources for the type that is selected.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>If set to No, only the sources are displayed.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Display Internal Sources on Internal Career Sections</td>
<td>When activated, the internal sources are displayed on the internal Career Sections.</td>
<td>No. This is a Private setting that can only be activated by Oracle Support.</td>
<td></td>
</tr>
</tbody>
</table>
When is the Source Filled for Candidates

There are two reasons why a source would automatically default in for a candidate.

- The candidate has already entered a source in a same session and the *Already Answered Source Tracking Question* setting is set to Yes. If the candidate logs out and logs back in again, then this would be considered a different session and therefore no matter what the setting is set to, the candidate would need to answer the source tracking question again.
- The candidate is sent to the career section via a URL that has a valid source or event ID pre-populated. As long as the candidate does not navigate away from the Taleo portion of the career section, then the source will default in. (In this case, the source does not have to be part of the Requisition Source list. It just must be an active source.)

If none of the above situation is true and the Source Tracking block is part of the application flow, then the candidate will be presented with the source tracking question.

Example 1: First submission in a session

A new or returning candidate accesses a career section. The candidate is presented with the Source Tracking block. The configuration of these settings will affect what is presented to the candidate:

- If the *Source Tracking Questions Mandatory* setting is set to Yes, the candidate must select a source type.
- If the *Source Tracking List Presented* setting is set to Yes, the candidate will select the source type first, then be presented with the sources for the selected source type.
- If the source or event ID was not embedded in the URL, the candidate must select the source or event.

Example 2: Subsequent submission in the session

The candidate applies on a second requisition during the same session.

- If the *Already Answered Source Tracking Question* is set to Yes, the candidate is not asked for the source a second time in the same session.
How is the Source List Content Determined

The list of sources displayed in candidate files, candidate job submissions, requisition files and career sections will differ depending on how a source is configured.

**Recruiting Center - Requisition File**

Sources configured as follows are displayed in requisition files:

- Status: Active.
- Visibility: Internal and Public.
- Use: In Requisition.
- The requisition Organization-Location-Job Field matches the source Organization-Location-Job Field.

If a new source is created using the above configuration, the system administrator can decide to add the newly created source to all Open and On Hold requisitions.

Recruiting Center users can modify the list of sources in a requisition (via the Posting and Sourcing tab).

**Recruiting Center - Create a Candidate - General Profile**

Sources configured as follows are displayed in candidate general profiles:

- Status: Active.
- Visibility: Internal and Public.
- Use: In Profile.

**Recruiting Center - Create a Candidate - Job Submission**

Sources configured as follows are displayed in candidate job submissions:

- Status: Active.
- Visibility: Internal and Public.
- Sources as configured in the Source List for the requisition or sources with the In Profile option.

**Recruiting Center - Edit a Candidate - General Profile**

Sources configured as follows are displayed in candidate general profiles:

- Status: Active.
- Visibility: Internal and Public.
- Use: In Profile.

**Recruiting Center - Edit a Candidate - Job Submission**

Sources configured as follows are displayed in candidate job submissions:

- Status: Active.
- Visibility: Internal and Public.
- Sources as configured in the Source List for the requisition. If there are no sources in the list, then the sources with the In Profile option are displayed.

**Internal Career Section - Job Submission**

Sources configured as follows are displayed to candidates:

- Status: Active.
- Visibility: Internal and Public if the Display Internal Sources on Internal Career Sections setting is enabled.
- Sources as configured in the Source List for the requisition.
External Career Section - Job Submission

Sources configured as follows are displayed to candidates:

- Status: Active.
- Visibility: Public.
- Sources as configured in the Source List for the requisition.

Internal Career Section - General Profile

Sources configured as follows are displayed to candidates:

- Status: Active.
- Visibility: Internal and Public if the Display Internal Sources on Internal Career Sections setting is enabled.
- Use: In Profile.

External Career Section - General Profile

Sources configured as follows are displayed to candidates:

- Status: Active.
- Visibility: Public.
- Use: In Profile.
Source Types

<table>
<thead>
<tr>
<th>Standard Taleo Source Types</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency</td>
</tr>
<tr>
<td>Agent</td>
</tr>
<tr>
<td>Billboards</td>
</tr>
<tr>
<td>Broadcast</td>
</tr>
<tr>
<td>Career Fair</td>
</tr>
<tr>
<td>Direct Mail</td>
</tr>
<tr>
<td>Direct Sourcing</td>
</tr>
<tr>
<td>Job Board</td>
</tr>
<tr>
<td>Magazines and Trade Publications</td>
</tr>
<tr>
<td>Mailing List</td>
</tr>
<tr>
<td>News Group</td>
</tr>
<tr>
<td>Newspapers</td>
</tr>
<tr>
<td>Other</td>
</tr>
<tr>
<td>Our Web Site</td>
</tr>
<tr>
<td>Professional Associations</td>
</tr>
<tr>
<td>Referral</td>
</tr>
<tr>
<td>Social Network</td>
</tr>
<tr>
<td>Talent Exchange</td>
</tr>
<tr>
<td>Taleo Performance</td>
</tr>
<tr>
<td>University Recruiting</td>
</tr>
<tr>
<td>Unsolicited</td>
</tr>
</tbody>
</table>
Staffing Agencies

Staffing Agencies and Agents

Agents can refer candidates for jobs or requisitions available in your organization. Each agent must belong to an agency and each agent is linked to a specific career section Agency Portal.

A staffing agency can be used for the following services:

- Staffing: Agency that provides full headhunter/recruiting services. The agency may recruit, prescreen and submit a candidate for a requisition via the agency portal.
- Media placement: Agency posting a requisition on electronic media such as newspapers, magazines, billboards.
- Internet mining: Agency searching the internet for candidates and resumes for a specific requisition.
- Sourcing strategy: Agency providing services to prepare a job ad.

The following business rules apply to agencies and agents:

- An agency cannot be linked to an agency portal. Only agents (associated to an agency) are linked to agency portals.
- An agent can only be associated to one agency. The agency must offer staffing services.
- An agent has access to only one agency portal.
- An agent can be associated to an Organization-Location-Job Field structure. When a user wishes to invite agents to refer candidates for a job, the structure associated to the agents displayed by the system will correspond to the one of the requisition. If an agent is associated to more than one Organization-Location-Job Field, the requisition/agent mapping must satisfy all associated structures of the requisition to appear on the list.

Details regarding agent ownership

Regarding agent ownership (at the candidate level), an agent cannot refer a candidate already owned by another agent. Ownership also prevents employee referrals even if the Accept Referrals from Employees for Known Candidates setting is activated. Note that regardless of ownership, professional agents can never refer a known candidate.

Regarding agent ownership (at the submission level), if the ownership delay is over, another agent can refer the same candidate on another requisition, but not on the current requisition.

For contingent staffing, a candidate may be referred over and over by various agents ONLY when the general ownership is expired, while this is not possible for professional staffing. The ownership at the submission level never expires. For professional agents, there is one ownership period, and once this period is over, the referral is "expired". For contingent agents, there is one ownership period, but it expires only at the general level. The ownership is kept at the submission level, since we need to continue to exchange with the same supplier for rate and time sheet until the job is completed, which might be weeks and months after the ownership has expired.
Requisition Posting via Staffing Agents

Posting a requisition via staffing agents involves many actions such as the creation of the agency portal, application flows, agencies and agents, as well as many actors such as the system administrator, the user, the agent and the candidate.

Agency portals (or career sections of type Agency) provide a fully integrated solution that enables organizations to deal directly with staffing agencies. This feature helps ensure the privacy of the organization's candidates and jobs by providing an agency-dedicated application flow within one or multiple agency portals.

The posting of a requisition via posting agents involves the following.

After creating a requisition, a recruiter can decide to use staffing agents to help him/her find candidates for the job. The list of agents available is dependent on the organization, location and job field selected for the requisition. The recruiter can select one or several staffing agents who will post the requisition on their job list, then determine the start and end time when candidate referrals will be allowed. Note that this process can take place after the requisition is opened but before it is posted to internal or external career sections as agents will be accessing the requisition through their own career section (agency portal).

An email is sent to staffing agents inviting them to refer candidates for the job. The staffing agent signs in to the Taleo agency portal, locates the requisition associated to him/her and refers a candidate. Depending on his permissions, the staffing agent may be able to refer candidates who already exist in the database or refer an already referred candidate at the job submission level. For details, see Configuring Candidate Referrals.

When changing the agent who referred a candidate, if you want to reselect the original referring agent and the original ownership is expired, the change will not take effect unless a different agent is first selected and then another modification is made to reselect the original agent.

Candidates being referred receive an email informing them that they were referred by an agent for a job and inviting them to review the profile information submitted by the agent.

Later, when searching through the candidate database, the recruiter can easily identify candidates referred by an agent with this icon . The tracking tab of the candidate file also displays the name of the agency and that of the agent who referred the candidate. Candidates referred by an agent are considered agent-owned candidates. However, the user can remove the agent-ownership. The user has the possibility to perform a duplicate check to see if the candidate already exist in the database.

Creating a Staffing Agency

The creation of a staffing agency consists of the following steps.

1. Creating a career section of type Agency Portal and selecting an application flow of type Agency. This is done via the Career Section Administration menu. For details, refer to the Career Section Configuration Guide.
2. Creating the staffing agency.
3. Selecting preferred agencies.
4. Defining a referral ownership period.

Creating a Staffing Agency

Prerequisite

The career section of type Agency Portal and the agency application flows must be created. This is done via the Career Section Administration menu. For details, refer to the Career Section Configuration Guide.
Steps

1. Click the Agencies tab.
2. Click New...
3. In the Properties tab, complete the fields.
   a) Enter the name of the agency and translate the name in all available languages. Use the same name for
      the agency and the career section Agency Portal.
   b) Select the visibility of the source. An internal source will appear to Recruiting Center users. A public
      source will appear to Recruiting Center users and candidates.
   c) Enter the agency email address. The same email address cannot be used for an agency and an agent.
   d) Select the Staffing option under Services. Staffing must be selected if you want to designate this
      agency as an agency portal and if you want to attach agents to this agency. Also, when you select
      Staffing, Sourcing Strategy, Internet Mining, and Media Placement are automatically included.
      The Contingent Staffing option is used for contingent staffing which may include part-time, temporary
      and contractor work. MWBE means Minority Women Business Owned. This is a flag available when
      exporting the agency information to an external system where billing occurs.
   e) Click Save.
4. Click the Agents tab.
5. Click New...
6. Complete the Identity tab.
   a) Enter the agent information.
   b) Select a preferred language of correspondence.
   c) Specify the name of the agency to which the agent belongs.
   d) Select the visibility of the source. If selecting Internal, the agent's name will appear to Recruiting
      Center users. If selecting Public, the agent's name will appear to Recruiting Center users and
      candidates.
   e) Click Save.
7. Complete the Login tab.
   a) Select a portal. If you do not select a portal, the agent will be considered inactive and recruiters will
      not be able to invite this agent to refer candidates.
   b) Enter the email address for the agent.
   c) Provide a password for the agent. Enter the password a second time to validate the password.
   d) Click Save.
8. Click the Organization, Location and/or Job tabs if you want to assign structure elements to the agency.
   When recruiters will ask agencies to find candidates, only the agencies corresponding to the Organization-
   Location-Job Field of the requisition will be displayed. Otherwise, the agency will be available for all
   requisitions regardless of the requisition Organization-Location-Job Field structure.
9. Click Done.

Selecting a Preferred Agency

Prerequisite
The agency must be created.
Steps
1. Click Options...
2. Click the Preferences tab.
3. Select your preferred agency for each type of posting.
4. Click Done.
5. Click Save

Result
The selected agency for each type of posting will be displayed by default when recruiters post a requisition.

Defining a Referral Ownership Period

Prerequisite
The Agent Ownership Delay recruiting setting must be enabled.

Configuration > [Recruiting] Administration > Agencies

Steps
1. Click Options...
2. Click the Candidate Referral tab.
3. Specify the number of days during which agents own rights over referrals. Select Unlimited if you want agents to own the referral for an unlimited or undetermined period of time.
4. For contingent staffing, specify the number of days during which agents own rights over referrals. Select Unlimited if you want agents to own the referral for an unlimited or undetermined period of time.
5. Click Done.

Result
Once the duration period has expired, the agent no longer owns the candidate, therefore the agent will not receive any compensation if the candidate is hired on a requisition; however, the candidate file will indicate referral ownership with an expired status.
Agency Gateways

Agency Gateways

Besides traditional staffing agencies using an agency portal, there are other agency designations that can be set up to display as selections in the requisition Posting and Sourcing tab.

There are three links in the requisition Posting and Sourcing tab that relate to agency setup:

- Non-Electronic Media (for ad placement agencies)
- Internet Mining
- Sourcing Strategy Request

Creating a Media Placement, Internet Mining or Sourcing Strategy Agency

**Prerequisite**

Configure > [Recruiting] Administration > Agencies

**Steps**

1. Click the Agencies tab.
2. Click New...
3. In the Properties tab, complete the fields.
   a) Enter the name of the agency and translate the name in all available languages. Use the same name for the agency and the career section Agency Portal.
   b) Select the visibility of the source. An internal source will appear to Recruiting Center users. A public source will appear to Recruiting Center users and candidates.
   c) Enter the agency email address. The same email address cannot be used for an agency and an agent.
   d) Select Media Placement, Internet Mining or Sourcing Strategy under Services.
   e) Click Save.
4. Click the Organization, Location and/or Job tabs if you want to assign structure elements to the agency. When recruiters will ask agencies to find candidates, only the agencies corresponding to the Organization-Location-Job Field of the requisition will be displayed. Otherwise, the agency will be available for all requisitions regardless of the requisition Organization-Location-Job Field structure.
5. Click Done.
## Agency - Permissions and Settings

The following permissions and settings are used to configure staffing agencies and agency gateways.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post to staffing agents/agencies</td>
<td>Configuration &gt; [SmartOrg] Administration&gt; [Users] User Types &gt; Recruiting &gt; Sourcing</td>
</tr>
<tr>
<td>Request Internet mining by specialized agencies</td>
<td>Configuration &gt; [SmartOrg] Administration&gt; [Users] User Types &gt; Recruiting &gt; Sourcing</td>
</tr>
<tr>
<td>Request sourcing strategy by specialized agencies</td>
<td>Configuration &gt; [SmartOrg] Administration&gt; [Users] User Types &gt; Recruiting &gt; Sourcing</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agent Ownership Delay</td>
<td>Period during which agents own rights over referrals</td>
<td>0 day</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Contingent Staffing Agent Ownership Delay</td>
<td>Period during which contingent staffing agents own rights over referrals.</td>
<td>0 day</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Accept Referrals from Employees for Known Candidates</td>
<td>Determines if employees can refer candidates who already exist in the database.</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
</tbody>
</table>
Agency - Other Configuration Tasks

Creating an Agent

**Prerequisite**

*Configuration > [Recruiting] Administration > Agencies*

**Steps**

1. Click the Agents tab.
2. Click New...
3. Complete the Identity tab.
   a) Enter the agent information.
   b) Select a preferred language of correspondence.
   c) Specify the name of the agency to which the agent belongs.
   d) Select the visibility of the source. If selecting Internal, the agent's name will appear to Recruiting Center users. If selecting Public, the agent's name will appear to Recruiting Center users and candidates.
   e) Click Save.
4. Complete the Login tab.
   a) Select a portal. If you do not select a portal, the agent will be considered inactive and recruiters will not be able to invite this agent to refer candidates.
   b) Enter the email address for the agent.
   c) Provide a password for the agent. Enter the password a second time to validate the password.
   d) Click Save.
5. Click the Organization, Location and/or Job tabs if you want to assign structure elements to the agency. When recruiters will ask agencies to find candidates, only the agencies corresponding to the Organization-Location-Job Field of the requisition will be displayed. Otherwise, the agency will be available for all requisitions regardless of the requisition Organization-Location-Job Field structure.
6. Click Done.

Deleting an Agent

**Prerequisite**

Referrals must be transferred to another agent.
System must be in maintenance mode.

*Configuration > [Recruiting] Administration > Agencies*

**Steps**

1. Click the Agencies tab.
2. Click on the agency name.
3. In the Agents tab, select the agent.
4. Click .
5. Click Done.

**Result**

Users can no longer ask this agent to refer candidates. The information of the agent is permanently deleted from the system.

### Deactivating an Agent

**Prerequisite**

The agent must be created in order to deactivate it.

**Configuration** > [Recruiting] Administration > Agencies

**Steps**

1. Click the Agents tab.
2. Click the name of the agent.
3. In the Login tab, select Not Specified in the Portal drop-down list.
4. Click Done.

**Result**

Recruiters can no longer ask this agent to refer candidates. The information on the agent is still available in the system.

### Deleting an Agency

**Prerequisite**

Agents associated to the agency must first be deleted.

Referrals of the agents must be transferred to another agent.

**Configuration** > [Recruiting] Administration > Agencies

**Steps**

1. Click the Agencies tab.
2. Select the agency.
3. Click .

**Result**

The agency is no longer available in the Agencies list of the Agency Management page.

### Transferring Referrals to Another Agent

**Prerequisite**

Referrals must be transferred to an agent from the same agency.

**Configuration** > [Recruiting] Administration > Agencies

**Steps**

1. Click the Agents tab.
2. Click on the desired agent.
3. In the Login tab, click Transfer Referrals...
4. Browse to select an agent.
5. Click OK.
Job Boards

- Job Board Account ................................................................. 414
- USAJOBS ............................................................................. 418
**Job Board Account**

eQuest job board accounts enable Recruiting Center users to post their requisitions to multiple job boards through the eQuest job distribution portal.

Posting requisitions on job boards is performed by using eQuest, a job posting distributor that gives access to the world’s largest network of job posting sites.

eQuest job board accounts are created by the system administrator. However, those accounts must have been created in eQuest first, with the same user name and password. Therefore, job boards available for a specific account are set by eQuest. The system administrator can create as many accounts as needed. However, only one account can be designated as the default account.

**Core Job Boards**

A list of core job boards is bundled with the Recruiting Cloud Service subscription. Customers must work with eQuest for additional job boards.

<table>
<thead>
<tr>
<th>Taleo Enterprise Core Job Boards</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Monster</strong> - All US and International locations.</td>
</tr>
<tr>
<td><strong>USAJOBS</strong> - United States.</td>
</tr>
<tr>
<td><strong>CareerBuilder</strong> - United States.</td>
</tr>
<tr>
<td><strong>LinkedIn</strong> - All US and International locations.</td>
</tr>
<tr>
<td><strong>Workopolis</strong> - Canada.</td>
</tr>
<tr>
<td><strong>SEEK</strong> - Asia Pacific.</td>
</tr>
<tr>
<td><strong>Taleo Talent Exchange</strong> - US locations.</td>
</tr>
<tr>
<td><strong>Wildcard</strong> - One additional job board may be selected from eQuest’s current list of electronically supported job boards at inception of their Taleo contract (“Additional Core Board”). eQuest will support a process to allow customers to change their Additional Core Board up to one time per year following the customer’s first anniversary date of contract with eQuest.</td>
</tr>
</tbody>
</table>

In the event that a customer requests the delivery of job postings to a job board that is not in the above list, such request may be referred to eQuest to be managed via a direct contract between eQuest and the customer.

Once the Taleo Enterprise integration setup is completed for eQuest, eQuest will work directly with the customer to collect appropriate credentials and complete setup to any core job boards or non-core job boards and any related configuration for customer reporting and analytics. eQuest will provide customers with an Activity Report each month listing key data elements associated with each job posting, including date of insertion, recruiter name, requisition number, job title and job location, and total eQuest transactions for the prior month.

**Sending Customer City and Zip/Postal Code to eQuest**

Customers have the possibility to send the customer city and its zip/postal code to eQuest. A setting is available for this functionality:

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Possible Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>City Location Level for eQuest Posting</strong></td>
<td>When posting requisitions to eQuest, the level specified here</td>
<td>A number from 1 to 5 based</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
</tbody>
</table>
### Setting Configuration Guide

#### Table 1: Location Setting

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Possible Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>will be considered as the location level for cities.</td>
<td>on locations configuration</td>
<td></td>
</tr>
</tbody>
</table>

This setting allows the system administrator to specify the location level that will be considered when posting a requisition to eQuest. Once set, the location sent to eQuest to represent the requisition city will no longer be the RSLocation level 3 and its postal code, but the location level specified in this setting. This will allow customers to post a requisition to the most precise city location, usually located at level 3 or level 4.

In SmartOrg, under Locations, Element Management, the Zip/Postal Code field is available for each level of location.

In Taleo Recruiting, when associating a Location structure to a requisition, the zip/postal code set for the location in SmartOrg is used by eQuest to post a requisition on a job board at the appropriate location (instead of using the RSLocation set by the system), provided the City Location Level for eQuest Posting setting has been configured in the administration module.

Requisitions can be associated to any level of company defined locations. When Taleo sends the requisition to eQuest, we always try to send three location values:

- **Country**: this is derived from the mapping between location and the reference RSLocation level 1 done in SmartOrg by the administrator.
- **State/Province**: this is also derived from the mapping done in SmartOrg between the location and RSLocation level 2. This exists only if the requisition has an associated location at least at the state/province level.
- **City**: by default, this is also derived from the mapping between location and RSLocation at level 3, if the requisition is associated to a location with a level 3 mapping. If not, such information is not sent to eQuest, although it is usually required, depending on the country and job board. With the City Location Level for eQuest Posting setting, customers can send a more precise location, as defined in SmartOrg, instead of sending the broader RSLevel3, which represents a region rather than a city. For a large city such as San Francisco, this does not change the situation that much, although you can define a more precise zip/postal code if required. But for a city like Dublin, CA, which does not exist in our list of reference regions in RSLocation, you can now use your own location instead of using the closest region, which would be Hayward on this example, which is about 10 miles away.

Zip/postal codes will be considered by eQuest when posting a requisition only if the zip/postal code is for the US and few other countries, but not all.

#### Sending Department Code to eQuest

Customers also have the possibility to send the department code in order to do some reporting in eQuest. A setting is available for this functionality:

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send Department Information to eQuest When Posting Requisitions</td>
<td>Send department information to eQuest when posting requisitions. By default, department information is not sent.</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
</tbody>
</table>

This setting allows the system administrator to specify if the department number will be provided to eQuest when posting requisitions to eQuest. This is not used for posting purposes, but rather to allow reporting at the department level in eQuest.

### Posting Requisitions on Job Boards using eQuest

---

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To post a requisition on a job board using eQuest, the requisition must first be posted on an external company career section. A requisition can be posted as many times as required but it cannot be posted twice on the same job board account. All job board accounts to which a requisition is already posted will be unavailable in the Sourcing Manager page. The requisition must be posted on an external company career section for at least the same time as on eQuest job board account.

Accounts can be associated to an Organization-Location-Job Field structure or the group of the current requisition. Therefore when a user chooses to post a requisition, only the accounts with a structure corresponding to the requisition’s Organization-Location-Job Field structure will be available.

Users can have access to several job board accounts. Every account that applies to a user is shown in Recruiting Center when posting a requisition.

Creating a Job Board Account

Prerequisite
Configuration > [Recruiting] Administration > Job board Accounts

Steps
1. Click New...
2. Under the Properties tab, select eQuest in the supplier drop-down list.
3. Complete the fields as required in the Properties, Login and Permissions tab.
4. Click Save.

Result
The newly created job board account appears in the Job Board Accounts list.

Deleting a Job Board Account

Prerequisite
Configuration > [Recruiting] Administration > Job board Accounts

Steps
1. Select a job board account.
2. Click .

Result
The job board account no longer appears in the Job Board Accounts list.
The job board account will no longer be displayed in Recruiting Center to users with appropriate permission.

Editing a Job Board Account

Prerequisite
Configuration > [Recruiting] Administration > Job board Accounts

Steps
1. Click on the name of a job board account.
2. Modify the fields as required in the Properties, Login and Permissions tab.
3. Click Save.

**Result**
The account name, password and permissions are modified as specified, after the job board account has been created.

**Next Step**
Granting users access to a job board.

---

**Granting Access to a Job Board Account**

**Prerequisite**

*Configuration > [Recruiting] Administration > Job board Accounts*

**Steps**

1. Click on the name of a job board account.
2. Select the Permissions tab.
3. Grant permissions of users, groups or organizations.
4. Click Done.

**Result**
Users who have been granted access to the job board account will be able to use this account in Recruiting Center to post a requisition.

---

**Revoking Access to a Job Board Account**

**Prerequisite**

*Configuration > [Recruiting] Administration > Job board Accounts*

**Steps**

1. Click the name of a job board account.
2. Select the Permissions tab.
3. Modify the permissions of users, groups or organizations.
4. Click Done.

**Result**
Users who had their access revoked to the job board account will no longer be able to use this account to post a requisition in Recruiting Center.
Candidate Information Import from USAJOBS

Candidates coming from USAJOBS (the official job site of the U.S. federal government) can automatically log into a Taleo career section and automatically import their USAJOBS profile into a job submission.

Below is the basic flow of activities taking place when applying through USAJOBS.

Posting a requisition on USAJOBS

Requisitions can be posted on the USAJOBS Web site through eQuest (requisitions are posted on other job boards in the same manner).

Creating an account on USAJOBS

When creating an account on USAJOBS, candidates need to create their general profile by providing general information such as their name, telephone number, email address. They also need to create a resume by providing their work experience, education, references. Candidates can create multiple resumes but they can only use one of them when they apply for a job.

Applying on a job on USAJOBS

Candidates log into the USAJOBS Web site, search for the job for which they want to apply, select a resume they created on the USAJOBS Web site and click the "Apply online!” button. Candidates are then redirected to a Taleo career section to complete the application process.

The Taleo career section to which candidates are redirected when they apply on the USAJOBS Web site must have the Display the OpenID option (Configuration > [Career Section] Administration > Career Sections > click a career section > Sign In) set to Yes. Otherwise, an Access Denied error message will be displayed to candidates coming from USAJOBS. This is a known issue.

The first time candidates access the Taleo career section, a sign-in page is displayed on which they are asked if they have an account. Three possible options are available:

• Option 1: If candidates have an account because they applied on the Taleo career section before, they can log in with their career section credentials and choose to import their USAJOBS profile information. When the candidates log in, their USAJOBS ID is linked to their existing Taleo career section candidate ID.

• Option 2: If candidates have an account because they applied on the Taleo career section before, they can log in with their career section credentials and choose not to import their USAJOBS profile information. When candidates log in, their USAJOBS ID is linked to their existing Taleo career section candidate ID.

• Option 3: If candidates do not have an account because they never applied on the Taleo career section, they are asked to create one. When candidates do that, their USAJOBS profile is automatically imported and the new account is linked to their USAJOBS ID.

If the email address in the USAJOBS account is identical to an email address stored in the Taleo career section, a message is displayed informing candidates that their email address is already linked to a candidate profile. Candidates are invited to enter the user name and password of the career section account (to link the two accounts together) and to apply using the existing candidate profile.

Creating a new career section account

If candidates select option 3, they have to specify a user name and a password to log into the career section. From there, the standard candidate creation process takes place.
Importing candidate information from USAJOBS

Candidates' information is imported from USAJOBS. As a result, some fields in the application flow are filled automatically with information coming from the candidate USAJOBS general profile and resume. Note that resume information entered manually on USAJOBS is imported, not information contained in a file attachment. Also, imported information that is not part of the application flow is saved in the Taleo candidate file but the candidate will be unable to see it.

This table presents Taleo career section fields whose content may be imported from USAJOBS.

<table>
<thead>
<tr>
<th>Personal Information</th>
<th>Work Experience</th>
<th>References</th>
<th>Education</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address (Line 1)</td>
<td>Current Job</td>
<td>Email Address</td>
<td>City</td>
</tr>
<tr>
<td>Address (Line 2)</td>
<td>End Date</td>
<td>First Name</td>
<td>Education Level (Achieved)</td>
</tr>
<tr>
<td>Cellular Number</td>
<td>Other Employer</td>
<td>Last Name</td>
<td>GPA</td>
</tr>
<tr>
<td>City</td>
<td>Other Function</td>
<td>Middle Name</td>
<td>GPA out of</td>
</tr>
<tr>
<td>Email Address</td>
<td>Start Date</td>
<td>Organization</td>
<td>Graduation Date</td>
</tr>
<tr>
<td>Fax Number</td>
<td>Phone Number</td>
<td>Other Institution</td>
<td></td>
</tr>
<tr>
<td>First Name</td>
<td>Title</td>
<td>Other Program</td>
<td></td>
</tr>
<tr>
<td>Home Phone Number</td>
<td>Type</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Middle Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Place of Residence</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Preferred Location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shift Availability Grid</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Work Phone Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Zip/Postal Code</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Files attached to a candidate general profile in USAJOBS cannot be imported into a Taleo career section.

The Reference Name in a USAJOBS resume is imported into the Reference First Name field in Taleo because USAJOBS does not use two separate fields as Taleo does.

Returning to USAJOBS

Once candidates have completed their job application, the Thank You page is displayed. Candidates can click a link on the page to return to the USAJOBS Web site. Customers might consider adding additional links back to the USAJOBS Web site on other career section pages (such as the My Submissions page). Candidates can monitor the status of their submissions by accessing the USAJOBS Application Status page. As candidates move through the various steps and statuses of the candidate selection workflow, status update notifications are sent to USAJOBS and the Application Status page displays up-to-date information. For more information on the application status update, see Sending Candidate Submission Status Updates to USAJOBS.

By default (unless configured otherwise through the application status updates feature), the USAJOBS application status will be:
• Application Received: Set if candidates click the "Return to USAJOBS" link.
• Application Status not Available: Set if candidates do not click the "Return to USAJOBS" link.

Updating an existing application or applying on a new job on USAJOBS

Once a candidate has accessed a Taleo career section through USAJOBS either by creating a new career section account or using an existing one, the USAJOBS account and the career section account are linked together. As a result, when updating an existing application or applying on a new job through USAJOBS, the candidate is automatically logged into the career section and does not need to provide a user name or password.

If candidates modify their USAJOBS profile and resume, they can re-import them before accessing their candidate submission. Once they log into the career section, the application flow is filled automatically with information coming from the updated candidate USAJOBS general profile and resume.

Sending Candidate Submission Status Updates to USAJOBS

This feature permits Taleo Recruiting to send candidate submission status updates to USAJOBS so that candidates are kept informed of the status of their submissions on the USAJOBS Web site.

Once candidates have applied through USAJOBS, they have access to an Application Status page on the USAJOBS Web site where they can view the status of their submissions. As candidates move through the various steps and statuses of the candidate selection workflow, status update notifications are sent to USAJOBS and the Application Status page displays up-to-date information.

It is possible to send status updates to USAJOBS based on the following events:

• Submission Created: A status update is sent to USAJOBS the first time candidates click the Save and Continue button while creating a submission.
• Submission Completed: A status update is sent to USAJOBS when candidates click the Submit button to complete their submission.
• Submission Changes: A status update is sent to USAJOBS when candidates reach a specific workflow/step/status combination in Taleo Recruiting. When the bypass action is used to change a step/status, updates are not sent to USAJOBS even if the action was mapped to a USAJOBS status.

Once a status update has been sent to USAJOBS and the status is updated on USAJOBS, an event is added in the Recruiting Center, on the candidate file History tab. It may take a few minutes for the status update to be sent to USAJOBS and for the history event to be displayed.

Configuration

In the Status Update section of the Sourcing page, system administrators can view the list of current status mappings and invalid mappings (mappings for which the workflow, step or status no longer exists.), remove mappings and create new ones. When creating a status mapping, system administrators have to map Taleo Recruiting statuses to USAJOBS statuses. The configuration of the status mapping is done in the Candidate Sourcing module (Configuration > [Recruiting] Administration > [Integration] Candidate Sourcing).

USAJOBS has a predefined list of 31 statuses.

<p>| Announcement Cancelled (3423) | Ineligible - “Who May Apply” Requirements Not Met (9006) | Multiple Grades/Status/Agencies – Minimum Qualifications Requirements Not Met (11316) |
| Applicant Declined Appointment (11112) | Ineligible - Application Incomplete (9008) | Multiple Grades/Status/Agencies – Not Referred/Not Among the Top Candidates (11538) |
| Application Incomplete (3419) | Minimum Qualification Requirements Met (11312) | Multiple Grades/Status/Agencies – Not Selected (11319) |</p>
<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Received (3420)</td>
<td>Minimum Qualification Requirements Not Met (9007)</td>
<td>Multiple Grades/Status/Agencies – Selected (11320)</td>
<td></td>
</tr>
<tr>
<td>Application Status Not Available (11542)</td>
<td>Multiple Grades/Status/Agencies – Announcement Cancelled (11321)</td>
<td>Not Referred/Not Among the Top Candidates (11537)</td>
<td></td>
</tr>
<tr>
<td>Application Withdrawn (3417)</td>
<td>Multiple Grades/Status/Agencies – Applicant Declined Appointment (11322)</td>
<td>Not Selected (3425)</td>
<td></td>
</tr>
<tr>
<td>Eligible - Application Not Referred to Selecting Official (9005)</td>
<td>Multiple Grades/Status/Agencies – Eligible-Application Not Referred to Selecting Official (11313)</td>
<td>Resume Received (3418)</td>
<td></td>
</tr>
<tr>
<td>Eligible - Application Referred to Selecting Official (3422)</td>
<td>Multiple Grades/Status/Agencies – Eligible-Application Referred to Selecting Official (11314)</td>
<td>Reviewing Applications (9004)</td>
<td></td>
</tr>
<tr>
<td>Eligible – Referred for Structured Interview (11539)</td>
<td>Multiple Grades/Status/Agencies – Ineligible – Application Incomplete (11318)</td>
<td>Selected (3426)</td>
<td></td>
</tr>
<tr>
<td>Eligible – Referred to Next Step in Selection Process (11540)</td>
<td>Multiple Grades/Status/Agencies – Ineligible – “Who May Apply” Requirements Not Met (11315)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hired (11541)</td>
<td>Multiple Grades/Status/Agencies – Minimum Qualifications Requirements Met (11317)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Configuring Candidate Information Import from USAJOBS**

The configuration of the candidate information import from USAJOBS consists of the following steps.

1. Deploying the USAJOBS Certification. The system administrator, Oracle Support or Taleo Consulting Services performs this task in the Passport Console.
2. Configuring USAJOBS Settings.
3. Activating the USAJOBS Certification.
4. Mapping Taleo Recruiting statuses to USAJOBS statuses.
5. When configuring the Taleo career section to which candidates will be redirected when they apply on the USAJOBS Web site, the following option must be set to Yes: *Allow new users to register in system* (Configuration > [Career Section] Administration > Career Sections > click a career section > Sign In).
6. When configuring the Taleo career section, consider providing clear explanations (text) on the login page to inform candidates that they have been redirected to a Taleo career section and why they need to create an account. Also, since candidates have the opportunity to import information from USAJOBS, it is not necessary to include the Resume Upload block in the career section application flow for candidates coming from USAJOBS. If you decide to use the Resume Upload block, keep in mind that the information in this block will override information imported from USAJOBS.
Configuring USAJOBS Settings

Prerequisite
The system administrator must obtain from USAJOBS the authentication token string used to authenticate transactions on USAJOBS portal and enable Taleo to connect to the USAJOBS Web services.

The system administrator must obtain from USAJOBS the target URL for the USAJOBS integration server.

Configuration > [Career Section] Administration > Career Section Settings

Steps
1. Click USAJOBS Authentication Token.
2. Click Edit.
3. Enter the authentication token string in the Value field. For the USAJOBS integration to be functional, eQuest must be configured with the same token as the one defined in the USAJOBS Authentication Token setting. This token must be entered in the eQuest administration page (Boards > USAJOBS > Edit > Token (field)).
4. Click Save.
5. Click USAJOBS Integration Service URL.
6. Click Edit.
7. Enter the target URL for the USAJOBS integration server in the Value field.
8. Click Save.

Activating the USAJOBS Certification

Prerequisite
The Access integration services configuration permission is required to access the Candidate Sourcing module (Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Administration).

Configuration > [Recruiting] Administration > Candidate Sourcing > Sourcing

Steps
1. Click the USAJOBS sourcing service.
2. Click Edit.
3. Enter values in the fields.
4. Click Save.

Mapping Taleo Statuses to USAJOBS Statuses

Prerequisite
The Access integration services configuration permission is required.

Not all workflow/step/status combinations need to be mapped; only those for which updates need to be sent to USAJOBS.

Configuration > [Recruiting] Administration > [Integration] Candidate Sourcing

Steps
1. Click the USAJOBS sourcing link.
2. Click Create next to Status Update.
3. Select the desired event type.
4. If you selected Submission Created or Submission Completed, select the desired USAJOBS status in the Action drop-down list.
5. If you selected Status Changed, select the desired Taleo workflow/step/status combination and map it to the desired USAJOBS status in the Action drop-down list.
6. Click Save.
Merge Forms

- Merge Form

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Merge Form

A merge form is a PDF document that can be tied to candidate selection workflows, steps, and statuses and that can be generated/filled out at any point on demand by a user.

Merge forms are used during the hiring process. For example, during interviews with candidates, a recruiter may use a PDF form as a template to complete a candidate’s “Do not disclose” information. PDF forms are most typically used for various new hire paperwork or to print a candidate submission in a particular, customized format.

Merge forms are first built in Adobe Acrobat. System administrators then add them in the Recruiting Administration. If desired, they can also tie them to candidate selection workflows, steps, and statuses to make them available to users. Merge forms can be printed by a user, then further completed if needed and signed by the candidate. (None of this is tracked in the system).

If a field in the form is confidential to the user, a warning message is displayed and that field is left blank.

Merge forms can be pre-populated with variables retained in the system within the Message Template feature. These variables can be added using the Adobe Acrobat Professional Forms feature. For example, you could take a merge form (such as the I-9 form) and insert Taleo variables that will automatically pull information from the candidate file. Instead of typing the name of a candidate, the name would automatically appear in the form.

By default, the maximum file size of a merge form is 2 MB.

Merge forms may be available in any language. Merged data is available in English only. Most Asian languages are not supported, based on PDF conversion issues with tokens. The merged data will pull what is in the candidates file, so it may not be in English.

Configuring Merge Forms

The configuration of merge forms consists of the following steps.
1. Oracle Support must activate the Merge Form feature. Once activated, the Merge Forms feature becomes available in the Recruiting Administration menu.
2. Loading a form.
3. Inserting Taleo variables in the form.
4. Associating the form to a workflow, step, status.

The Fill Out Form feature does not suppress confidential data. That is, if a user is not authorized to view a piece of requisition or candidate data because of permissions (for example, the field is confidential, or the block such as Compensation or Screening Service is not visible), the user may still get access to this data using the Fill Out Form feature. When a user generates a form, all data included in the PDF will render in the file, regardless of the user's permissions. For this reason, customers should not embed fields in PDF forms that they do not want users to be able to access.

Loading a Merge Form

Prerequisite

The PDF form must first be built in Adobe Acrobat.

Configuration > [Recruiting] Administration > Merge Forms

Steps
1. Click New...
2. Enter a title and a code.
3. Select a PDF form using the Browse... button.
4. Select Available in the Status list.
5. Click Done.

Result
The form appears in the Merge Forms page. It is also available in the Forms tab of the Candidate Selection Workflow feature.

Inserting Taleo Variables in a Merge Form

Prerequisite
Adobe Acrobat Professional is required to insert variables.

Variables are available in the Recruiting Administration menu, in the Paragraphs feature (located in the Correspondence section).

Note that this procedure may differ according to the Adobe Acrobat Professional version being used.

Steps
1. In the Recruiting Administration menu, click Paragraphs located in the Correspondence section.
2. Click on a paragraph.
3. Click Edit next to Properties.
4. In the Available Variables selector, locate the desired variable then copy it.
5. Using Adobe Acrobat Professional, open a PDF form.
6. In the Tools menu, select Advanced Editing, then Text Field Tool.
7. Draw a box using your cursor. The Text Field Properties window appears.
8. In the Text Field Properties window, under the General tab, paste the copied variable in the Name field.
9. Enter any other information, such as a tooltip or if the field is required.
10. Click Close.

Result
The form contains Taleo variables that will automatically pull information from the candidate file into the form.

Associating a Merge Form to a Workflow, Step, Status

Prerequisite
The form must first be loaded via the Merge Forms feature.

Configuration > [Recruiting] Administration > Candidate Selection Workflow > Forms

Steps
1. Click on the title of a form.
2. Specify when the form will be available. Indicate if the form is always available or if it is only available when associated to a selected workflow, step, or status.
   - Select Always if the form will always be available.
   - Select In the contexts selected below if the form will be used in a specific workflow, step, or status.
3. If you selected the second option, select a workflow, step, or status then click Add. Recruiting Center users will be presented with the form when a candidate reaches the specified workflow, step or status.
4. Click Done.

**Merge Form - Other Configuration Tasks**

**Deleting a Merge Form**

*Prerequisite*
The merge form must not be used.

*Configuration > [Recruiting] Administration > Merge Forms*

*Steps*
1. Select a merge form.
2. Click .

*Result*
The merge form no longer appears in the list of merge forms.

**Activating a Merge Form**

*Prerequisite*
You must create the form in the Merge Forms page before you can activate it.

*Configuration > [Recruiting] Administration > Merge Forms*

*Steps*
1. Click a form.
2. Select Available in the Status drop-down list.
3. Click Done.

*Result*
In the Merge Forms page, Available appears in the Status column next to the merge form. The form is available when associating a form to a candidate selection workflow, step, or status.

**Deactivating a Merge Form**

*Prerequisite*
The form must be active.

*Configuration > [Recruiting] Administration > Merge Forms*

*Steps*
1. Click a form.
2. Select Not Available in the Status drop-down list.
3. Click Done.

*Result*
In the Merge Forms page, Not Available appears in the Status column next to the merge form. The form is no longer available for selection when associating a form to a candidate selection workflow, step, or status.
Adding the Work Shift Availability Grid in a Merge Form

Prerequisite
Adobe Acrobat Professional is required to insert variables.

For a list of variables used in the work shift availability grid, see Work Shift Availability Variables.

This procedure may differ according to the Adobe Acrobat Professional version being used. Also note that the Adobe LiveCycle Designer software cannot be used to insert token field names. To update a form created with Adobe LiveCycle Designer for use within Taleo, you must first print the form to create a regular PDF file, and then edit the new PDF file from within Adobe Acrobat.

Steps
1. In the list of variables available for the work shift availability, copy the desired variable. For example, {SHIFT_GRID_DAY1_PER1}.
2. Using Adobe Acrobat Professional, open a PDF form.
3. If you want the Work Shift Availability Grid to present availability using Yes or No text:
   a) In the Tools menu, select Advanced Editing, then Text Field Tool.
   b) Draw a box using your cursor. The Text Field Properties window appears.
   c) In the Text Field Properties window, under the General tab, paste the variable in the Name field.
   d) Enter any other information, such as a tooltip or if the field is required.
   e) Click Close.
4. If you want the Work Shift Availability Grid to present availability using checkmarks (a checkmark indicating that the user is available for a shift, no checkmark indicating that the user is not available):
   a) In the Tools menu, select Advanced Editing, then Radio Button Tool.
   b) Draw a box using your cursor. The Radio Button Properties window appears.
   c) In the General tab, paste the variable in the Name field.
   d) In the Appearance tab, set the Fill Color to white, and the Border Color to No color.
   e) In the Options tab, set the Button Style to Check and select the option "Button is checked by default".
   f) Click Close.

Work Shift Availability Variables

These variables are not included in the Paragraphs feature of the Correspondence Manager and can only be used in the Merge Form feature.

<table>
<thead>
<tr>
<th>Work Shift Availability Variables</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday_EarlyMorning: {SHIFT_GRID_DAY1_PER1}</td>
</tr>
<tr>
<td>Monday_MidDay: {SHIFT_GRID_DAY1_PER2}</td>
</tr>
<tr>
<td>Monday_Afternoon: {SHIFT_GRID_DAY1_PER3}</td>
</tr>
<tr>
<td>Monday_Evening : {SHIFT_GRID_DAY1_PER4}</td>
</tr>
<tr>
<td>Monday_Overnight: {SHIFT_GRID_DAY1_PER}</td>
</tr>
<tr>
<td>Tuesday_EarlyMorning: {SHIFT_GRID_DAY2_PER1}</td>
</tr>
<tr>
<td>Tuesday_MidDay {SHIFT_GRID_DAY2_PER2}</td>
</tr>
</tbody>
</table>
## Work Shift Availability Variables

<table>
<thead>
<tr>
<th>Day and Time</th>
<th>Shift Grid Day Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuesday Afternoon</td>
<td>SHIFT_GRID_DAY2_PER3</td>
</tr>
<tr>
<td>Tuesday Evening</td>
<td>SHIFT_GRID_DAY2_PER4</td>
</tr>
<tr>
<td>Tuesday Overnight</td>
<td>SHIFT_GRID_DAY2_PER5</td>
</tr>
<tr>
<td>Wednesday Early Morning</td>
<td>SHIFT_GRID_DAY3_PER1</td>
</tr>
<tr>
<td>Wednesday MidDay</td>
<td>SHIFT_GRID_DAY3_PER2</td>
</tr>
<tr>
<td>Wednesday Afternoon</td>
<td>SHIFT_GRID_DAY3_PER3</td>
</tr>
<tr>
<td>Wednesday Evening</td>
<td>SHIFT_GRID_DAY3_PER4</td>
</tr>
<tr>
<td>Wednesday Overnight</td>
<td>SHIFT_GRID_DAY3_PER5</td>
</tr>
<tr>
<td>Thursday Early Morning</td>
<td>SHIFT_GRID_DAY4_PER1</td>
</tr>
<tr>
<td>Thursday MidDay</td>
<td>SHIFT_GRID_DAY4_PER2</td>
</tr>
<tr>
<td>Thursday Afternoon</td>
<td>SHIFT_GRID_DAY4_PER3</td>
</tr>
<tr>
<td>Thursday Evening</td>
<td>SHIFT_GRID_DAY4_PER4</td>
</tr>
<tr>
<td>Thursday Overnight</td>
<td>SHIFT_GRID_DAY4_PER5</td>
</tr>
<tr>
<td>Friday Early Morning</td>
<td>SHIFT_GRID_DAY5_PER1</td>
</tr>
<tr>
<td>Friday MidDay</td>
<td>SHIFT_GRID_DAY5_PER2</td>
</tr>
<tr>
<td>Friday Afternoon</td>
<td>SHIFT_GRID_DAY5_PER3</td>
</tr>
<tr>
<td>Friday Evening</td>
<td>SHIFT_GRID_DAY5_PER4</td>
</tr>
<tr>
<td>Friday Overnight</td>
<td>SHIFT_GRID_DAY5_PER5</td>
</tr>
<tr>
<td>Saturday Early Morning</td>
<td>SHIFT_GRID_DAY6_PER1</td>
</tr>
<tr>
<td>Saturday MidDay</td>
<td>SHIFT_GRID_DAY6_PER2</td>
</tr>
<tr>
<td>Saturday Afternoon</td>
<td>SHIFT_GRID_DAY6_PER3</td>
</tr>
<tr>
<td>Saturday Evening</td>
<td>SHIFT_GRID_DAY6_PER4</td>
</tr>
<tr>
<td>Saturday Overnight</td>
<td>SHIFT_GRID_DAY6_PER5</td>
</tr>
<tr>
<td>Sunday Early Morning</td>
<td>SHIFT_GRID_DAY7_PER1</td>
</tr>
<tr>
<td>Sunday MidDay</td>
<td>SHIFT_GRID_DAY7_PER2</td>
</tr>
<tr>
<td>Sunday Afternoon</td>
<td>SHIFT_GRID_DAY7_PER3</td>
</tr>
<tr>
<td>Sunday Evening</td>
<td>SHIFT_GRID_DAY7_PER4</td>
</tr>
<tr>
<td>Sunday Overnight</td>
<td>SHIFT_GRID_DAY7_PER5</td>
</tr>
</tbody>
</table>

## Merge Form - Permissions and Settings

The following permissions and settings are used to configure merge forms.

The fields contained in a form obey to the following permissions granted to users:
### User Type Permission

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
</table>

### Setting

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Merge Form Activation</td>
<td>Activates the Merge Forms feature in the Recruiting Administration menu. This private setting can only be activated by Oracle Support.</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Maximum Number Merge Forms in List</td>
<td>Determines the maximum number of pages per merge form.</td>
<td>14</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Maximum Merge Form Size</td>
<td>Determines the maximum size (in bytes) of a single merge form.</td>
<td>512000 bytes</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
</tbody>
</table>
Contingent Hiring
Contingent Hiring

Contingent Hiring

Contingent hiring is used to hire people when needed and for a limited period of time from a third party agency specialized in submitting pre-qualified workers. Contingent hiring may include part-time, temporary and contractor work.

The Contingent Hiring solution is meant to support the first sourcing part of the typical contingent process, where specific requisitions are created and invitations to refer candidates are performed. Once the candidate submitted by an agent is selected for a limited term, there is usually a time sheet and billing process involved, not done within the Recruiting Center.

Once the Contingent Hiring feature has been purchased, the feature must be activated by Oracle Support. When the feature is activated and configured by the system administrator, users can start acquiring contingent workers. When creating a requisition, users can choose a Contingent requisition type which offers specific contingent functionalities like a candidate selection workflow built for contingent hiring, a Contingent Terms section, supplier invitation to submit candidates using the agency portal, confirmation of availability and specific candidate ownership rules, different from the rules associated with other agent submitted candidates. Once the candidate is hired, the system does not provide additional support like time sheet and billing. To feed such systems, integration with worker information, billing rate and suppliers (agents) can be done upon hiring.

Contingent Hiring Configuration

The configuration of Contingent Hiring by a system administrator is an extensive task and numerous aspects have to be taken into consideration.

The following describes the tasks to be done in a logical order. The order can slightly be changed, but it needs to respect some logic, like, for example, creating the agent portal before associating the agent to the portal.

Activation of the Contingent Hiring Feature

Once the Contingent Hiring feature has been purchased, the module must be activated by Oracle Support. This is done by setting the Contingent Functionality Activation setting to Yes.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contingent Functionality Activation</td>
<td>Activates Contingent functionalities.</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
</tbody>
</table>

For a list of impacts on features when enabling or not the Contingent Functionality Activation setting, see Impacts on Features when Enabling the Contingent Hiring Feature.

Configuration of User Type Permissions

The system administrator must grant the contingent staffing type to the users who will do contingent hiring.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow access to contingent requisitions</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Requisitions</td>
</tr>
</tbody>
</table>
The permission allowing the creation of contingent requisitions using a template must also be granted.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create requisitions - Only from a requisition template (contingent recruitment)</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Requisitions</td>
</tr>
</tbody>
</table>

### Configuration of Settings

The system administrator also enables the following settings.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contingent Staffing Agent Ownership Delay</td>
<td>Period during which contingent staffing agents own rights over referrals.</td>
<td>0</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Offer Default Start Date Hour</td>
<td>Default employee start time on the start date.</td>
<td>8 a.m.</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Calculator Default Hourly</td>
<td>In the salary calculator, assumes that employees work X hours per day.</td>
<td>8 hours</td>
<td>Configuration &gt; [Central Configuration] Settings</td>
</tr>
<tr>
<td>Calculator Default Daily</td>
<td>In the salary calculator, assume that employees work X days per week.</td>
<td>5 days</td>
<td>Configuration &gt; [Central Configuration] Settings</td>
</tr>
</tbody>
</table>

### Activation of the Contingent Requisition Type

A contingent requisition type is available. The system administrator must activate it. Once activated, the contingent requisition type becomes available when users are creating a requisition or requisition template in Taleo Recruiting.

For details, see *Activating a Requisition Type*.

### Configuration of Requisition Field Visibility

All requisition standard fields and user-defined fields are available for contingent usage, but they are not all suitable.

The system administrator can decide which fields are made available for contingent hiring by using the field exception feature. It is possible for the system administrator to remove a field from the contingent view, or make it optional while being mandatory for another staffing type. For example, the Description - Internal field can be configured in the file, but cannot be displayed to agents since the agency portal is by definition an external site. We recommend to deactivate such field via a contingent staffing type exception.

For details, see *Creating a Field Exception*.

A table presents requisition fields meant to be used for contingent purposes and that should be activated by the system administrator. While they are meant to serve the purpose of contingent hiring, these fields can be activated for any staffing type. See *Requisition Fields to be Used for Contingent*.

### Configuration of Requisition and Requisition Template Files

Requisition templates are important for the contingent hiring process. While it is not required to create a contingent requisition using a template, this is definitely the recommended practice.
The requisition should contain the Contingent Terms block where contingent specific standard fields are located. Two important fields should contain default values:

- **Maximum Hourly Rate**: Defines the maximum hourly rate allowed for the current requisition. It limits the requested hourly rate amount and also controls the maximum rate an agent can ask while submitting a candidate.
- **Requested Hourly Rate**: This is the requested hourly rate used to inform the agent about what should be submitted.

These two other fields are also important:

- **Estimated Labor Cost**: Hourly rate paid to the agency multiplied by the estimated number of hours per days, times the number of estimated days. This is only an estimation based on a fix number of hours per day and a fix number of days per week.
- **Estimated Labor Cost and Expenses**: Total estimated cost by adding the expenses to the estimated labor cost, when the expenses are reimbursable.

When one of the above two fields is present in the requisition, the Calculate option is displayed. When the Calculate button is pressed, the system calculates the value of those fields. This is based on the number of days the worker is hired based on the start date and end date, using the number of days per week (Calculator Default Daily setting), multiplied by the number of hours per day (Calculator Default Hourly setting). This number of hours is then multiplied by the requested hourly rate for the Estimated Labor Cost and will add the expense to this into the field Estimated Labor Cost and Expenses if the Expenses Reimbursable field is checked.

User-defined fields can be added into the form used within the Contingent Terms block, or anywhere else within the file. Ideally, the system administrator will also need to configure the system such that the Internal Description field is removed from the Contingent requisition file, since it is not displayed to the agent who is viewing requisitions through an external agency portal.

**Association of the Requisition User-defined File to the Contingent Staffing Type**

Once the user-defined file is created, the system administrator associates it to the Contingent Staffing type, where needed. Since there are other variations between contingent and other staffing type file format, it is recommended to have a file created specifically for contingent staffing type. This is also true for requisition templates.

For details, see [Associating a Requisition File to a Staffing Type](#).

**Configuration of Candidate Field Visibility**

All candidate standard fields and user-defined fields are available for contingent usage, but they are not all suitable.

The system administrator can decide which fields are made available for contingent hiring by using the field exception feature. It is possible for the system administrator to remove a field from the contingent view, or make it optional while being mandatory for another staffing type.

Note: While it is possible to do field level configuration for contingent fields, this is not recommended. We recommended instead to use the candidate file creation feature and to create a specific file to be used for contingent hiring using the Requisition File Setup feature available in the Taleo Recruiting Administration menu.

For details, see [Creating a Field Exception](#).

A table presents candidate fields meant to be used for contingent purposes and that should be activated by the system administrator. While they are meant to serve the purpose of contingent hiring, these fields can be activated for any staffing type. These fields are only available within the submission context and cannot be placed within the general profile. See Candidate Fields to be Used for Contingent.

Note: Contingent specific fields do not have their counterpart in the offer module. The offer module can be used for contingent purpose, but contingent fields listed under the requisition specific Contingent Terms block are not available into the offer module.
Association of the Candidate User-defined File to the Contingent Staffing Type

It is possible to configure a candidate file for contingent using the same approach as for requisition files. Unlike requisition files, the system administrator can only specify one candidate file for each configuration profile. But these files can have exceptions defined. In this case, it is possible to define the exception file used for contingent staffing type submissions.

For details, see *Associating a Candidate File to a Staffing Type*.

Creation of the Candidate Selection Workflow

This step is important because some of the candidate selection workflow steps are in theory managed directly by the supplier. The system will not require the system administrator to configure a Contingent Candidate Selection Workflow, but it is recommended to use a specific one to be aligned with realistic scenarios.

In a Contingent Candidate Selection Workflow, there is less prescreening, interview, or background check done for contingent workers when they are prequalified by the agent who will submit them. A scenario of how a customer would use Taleo’s contingent solution may include a step to allow the online confirmation from the agent and one to automatically move the candidate to the next step. In order for this scenario to occur, the customer must configure such confirmation request, based on the step and status triggering the confirmation link to display in the Agency Portal. To inform the agent to come back and use the confirmation page, a message template must be associated to the Contingent Candidate Selection Workflow and the triggering step and status.

When building the candidate selection workflow, try to keep the contingent flow as simple as possible and note where in the selection process you want to invite the agent to confirm price and availability of the worker you want to select. The offer step can be used in a Contingent Candidate Selection Workflow, but the contingent specific fields are not available, so it is not convenient. An enhancement request is being considered to better support contingent specific fields into the offer module. In the meantime, user-defined fields can be used but when doing so, the field is also visible under other staffing types.

When creating the Contingent Candidate Selection Workflow, it is a good practice to create a CSW for contingent not associated to any OLF, to serve as the default CSW for contingent.

For details, see *Building a Candidate Selection Workflow*.

Creation of an Agency Portal

The creation of the Agency Portal is done via the Career Section Administration module. When the system administrator creates the career section, the Agency Portal type must be selected. For details, refer to the *Career Section Configuration Guide*.

There is no rule preventing the sharing of a portal with contingent agents and other agents. However, it is recommended to use a contingent-specific agency portals for the following reasons:

- The job specific application flow might differ between contingent candidates and other candidates submitted by other agencies. As for candidate selection workflows, the focus is usually different and contingent candidates will be prescreened by the agencies, thus the pages related to background check or prescreening might not be part of the flow at all.
- The flow should also contain the contingent specific block, where the agent will be able to provide the agency bill rate and even the internal worker ID or requisition number, in order to use those unique IDs later during integration processes.
- Tier 2 and tier 3 agencies might be supported by delayed default posting. Since default posting duration, start and end, are defined at the portal level, creating few portals with different default values will help posting to tier1 agencies first, tier2 with a small delay and potentially tier3 with a longer delay. Such configuration has been requested few times in the past.
- Use the same portal for all agents of the same agency, in order to have a unique default posting duration value while selecting an agency.
The forgot username process, although an available option in the career section properties, should not be used since users are forced to log using their email address. Because it is activated by default, we recommended to deactivate it. (Configuration [Career Section] Administration > Career Sections > Security Settings).

Creation of the Agency Providing Contingent Services

The creation of a contingent agency is similar to the creation of professional agencies. Only agencies with the contingent staffing type will be available while inviting agents to submit candidates to contingent requisitions. The system administrator creates an agency, select the contingent type and decide whether or not this agency is MWBE, which means Minority Women Business Owned. This is a flag available when exporting the agency information to an external system where billing occurs. It has no functional impact in the recruiting application but might be required while exporting supplier information to an external system.

For details, see Creating an Agency.

Association of Agents to the Agency

The system administrator needs to add agents to the agency and associate each agent to a portal in order to be able to invite agents to submit candidates. Each agent requires a valid email address. This address will define where the invitations to refer will be sent. It is also used as the agent’s username. This is why we recommended to deactivate the forgot username setting in the career section properties.

When the recruiter will invite agencies to submit candidates, to avoid notifying too many agents at once, two options are available:

• Create agencies with a small number of agents.
• Define specific OLF for each agent. Such OLF contextualization will drive which agents are invited for each selected agency.

For details, see Staffing Agencies and Agents.

Configuration of the Agent Confirmation Request

The system administrator can configure the Agent Confirmation Request to send a request to the agent to confirm a candidate’s availability.

The Agent Confirmation Request is an important step of the contingent hiring process. It is optional, but highly recommended. At some point in the candidate selection process, the system administrator may want to allow the agent who submitted a candidate to confirm the candidate's availability. This is how the agent can interact with the candidate selection process and move the candidate forward automatically. The Agent Confirmation Request can be added to any status of a step of a candidate selection workflow. The system administrator can also decide the status the candidate automatically reaches based on the answer sent by the agent. Yes the candidate is available, or no the candidate is not available. The email sent to the agent requesting a confirmation contains the text included in the Agent Confirmation Question (multilingual).

The Agent Confirmation Request is configured in the Career Section Administration module. For details, refer to the Career Section Configuration Guide.

Configuration of the Agent Confirmation Email

The system administrator may decide to send an email message to agents asking them to confirm the candidate's presence. The system administrator may duplicate the Contribution Request, Agent message template as a starting point. The message should be configured as follows:

• Recipient: Agent.
• Delivery Type: Automatic.
• Triggering Event: Candidate Selection Workflow Context.
• Variable of interest: {CareerSection.AgentReferralUrl}. 
Contingent Requisition Ownership Rules

For contingent requisitions, the ownership between a submitted candidate and the submitting agent differs from employee or agent referral rules on all other requisition types.

First, there is a contingent specific ownership period used only for contingent submissions.

Second, there is a set of rules that differ from how ownership behaves on all other requisition types:

- Contrary to all other requisition types, ownership can change over time from agent to agent once expired.
- The original ownership is kept at the submission level even after it is expired at candidate level or replaced at candidate level by another agent, to maintain the relationship with the same agent for a specific job. This means users can see a different ownership from requisition to requisition.
- Ownership at the submission level can be modified by the end user. For all other staffing types, ownership is modifiable centrally and impacts all submissions, since there is only one ownership by candidate.

Ownership can exist at the candidate submission level for contingent workers. Once the general ownership is expired, another agent can submit the same candidate again on a new requisition. But while manually changing the agent in the candidate or submission file in the Recruiting Center, the referring agent is changed everywhere, impacting existing requisitions where another agent submitted the same candidate originally. Customer should not change the agent for candidates being active on at least one requisition with another agent.

Since the same agent can be used on both contingent and other staffing types agency referral scenarios, it is not the agent that will determine the ownership but rather the type of candidate submission in play. If the candidate submission that initiates the ownership is a contingent requisition, the contingent setting applies; if the candidate submission initiating the ownership is not contingent, then the standard setting applies. Contingent ownership periods are typically smaller.

Contingent Hiring - Exceptions to Standard Behavior

Important information regarding the behavior of specific features if used with contingent hiring.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Exception</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sourcing and posting</td>
<td>For contingent requisitions, sourcing is achieved exclusively through invitations sent to agents. There is no direct posting to career sections. This is because contingent hiring process relies on the association between a worker and an agent, and such association is requested at all time to correctly support contingent. To be able to invite an agent, the agent must be associated to an agency portal.</td>
</tr>
</tbody>
</table>
| Matching candidates   | Although matching candidates is allowed, matching a non-contingent candidate to a contingent requisition will generate a worker without an associated agent. This situation, which is probably an exception, can be corrected by adding the agent once the candidate is matched.  
Matching a contingent worker to a non-contingent requisition is also allowed, but can generate surprises to those workers since they might start to receive direct correspondences if they have an email in their candidate file (for example, invitations to complete their file and overwrite values entered originally by the |
<table>
<thead>
<tr>
<th>Feature</th>
<th>Exception</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contingent Hiring</td>
<td>agent). This should be considered carefully to avoid generating surprises to candidates. This might also look as an attempt to bypass the agent if this was not discussed previously.</td>
</tr>
<tr>
<td>Number of positions</td>
<td>For a contingent requisition, the start date and end date are managed within the requisition. As such, all positions of a single requisition will always have the same rate boundaries and start and end dates. If different boundaries are needed, different requisitions must be created.</td>
</tr>
<tr>
<td>Resume parsing</td>
<td>Resume parsing can be used within the agency portal. It can also be used by sending attachments through emails. However, if the agent sending the email is associated to a portal without a general profile flow, the system will not be able to parse the attachment. This is because all email based parsing is profile based and never for a specific job. This is why there is a standard message template that informs agents associated to a portal without a profile flow that if they ever send a resume to the <a href="mailto:zonename@resumeparsing.taleo.net">zonename@resumeparsing.taleo.net</a> address, the email parsing is not supported for them. If a profile flow is active, then all standard parsing responses might be triggered. The message template is named <em>Resume Parsing Service Unavailable to Agents</em>. This message is triggered when the profile flow is not activated in the agency portal associated with the agent.</td>
</tr>
<tr>
<td>Offer module</td>
<td>The offer module can be used with contingent hiring, although conceptually, the interaction between the organization and the candidate is done by the agent, thus the offer module, meant to serve as a contractual agreement between the candidate and the organization, is not the natural path. While most standard fields and user-defined fields can be made available for contingent specific offers, the contingent-specific fields such as Start Date, End Date, Start Time, End Time and Staffing Agency Hourly Rate are not available in the offer module. This aligns to the original design of contingent and is the current expected behavior.</td>
</tr>
<tr>
<td>Agency with both Staffing and Contingent Staffing services</td>
<td>When both the Staffing and Contingent Staffing services are selected for a specific agency, the system will act as contingent or not based on the requisition where the candidate is submitted. But if the agents associated to such agencies are submitting new candidates as general profiles - through either a profile flow or resume parsing by email - then the system will consider those candidates as non-contingent candidates. It is recommended to have only job-specific application flows when agencies serving both contingent and non contingent are required. If an agent associated to a contingent only agency is submitting a candidate profile, then the ownership delay of the contingent definition will be applied.</td>
</tr>
<tr>
<td>Hiring contingent candidates</td>
<td>In order to hire a candidate on a contingent requisition, the candidate must be associated to an agent. All candidates submitted through the agency portal will get such association. However, candidates created manually, matched to a contingent requisition or imported might not have such agent association at first and it must be added before being able to hire the candidate on any contingent requisition.</td>
</tr>
</tbody>
</table>
## Impacts on Features when Enabling the Contingent Hiring Feature

<table>
<thead>
<tr>
<th>Feature</th>
<th>Contingent Functionality Activation setting is enabled</th>
<th>Contingent Functionality Activation setting is not enabled</th>
</tr>
</thead>
<tbody>
<tr>
<td>List Formats</td>
<td>No impact.</td>
<td>No impact.</td>
</tr>
<tr>
<td>Fields</td>
<td>Contingent staffing type is available.</td>
<td>Contingent staffing type is not available.</td>
</tr>
<tr>
<td>Selection Lists</td>
<td>No impact.</td>
<td>No impact.</td>
</tr>
<tr>
<td>Candidate User-defined Files</td>
<td>Contingent staffing block is available.</td>
<td>Contingent staffing block is available, but not displayed in the Recruiting Center.</td>
</tr>
<tr>
<td>Requisition and Requisition Template User-defined Files</td>
<td>Contingent Terms block is available.</td>
<td>Contingent Terms block is available, but not displayed in the Recruiting Center.</td>
</tr>
<tr>
<td>Candidate File Setup</td>
<td>Contingent staffing type is available.</td>
<td>Contingent staffing type is not available.</td>
</tr>
<tr>
<td>Requisition File Setup</td>
<td>Contingent staffing type is available.</td>
<td>Contingent staffing type is not available.</td>
</tr>
<tr>
<td>Requisition User-defined Forms</td>
<td>Contingent Terms form is available.</td>
<td>Contingent Terms form is available.</td>
</tr>
<tr>
<td>Candidate Search Page</td>
<td>No impact.</td>
<td>No impact.</td>
</tr>
<tr>
<td>Candidate Selection Workflow</td>
<td>Contingent option is available under Context Display tab.</td>
<td>Contingent option is not available under Context Display tab.</td>
</tr>
<tr>
<td>Matching Configuration</td>
<td>No impact.</td>
<td>No impact.</td>
</tr>
<tr>
<td>Message Templates</td>
<td>No impact.</td>
<td>No impact.</td>
</tr>
<tr>
<td>Agencies</td>
<td>Contingent option is available</td>
<td>Contingent option is not available.</td>
</tr>
<tr>
<td>Department List</td>
<td>No impact.</td>
<td>No impact.</td>
</tr>
<tr>
<td>Position List</td>
<td>No impact.</td>
<td>No impact.</td>
</tr>
<tr>
<td>Merge Forms</td>
<td>No impact.</td>
<td>No impact.</td>
</tr>
<tr>
<td>Notifications</td>
<td>No impact.</td>
<td>No impact.</td>
</tr>
<tr>
<td>Regional Settings</td>
<td>No impact.</td>
<td>No impact.</td>
</tr>
<tr>
<td>Requisition Types</td>
<td>Contingent Type available.</td>
<td>Contingent Type is not available.</td>
</tr>
<tr>
<td>Center Stage</td>
<td>No impact.</td>
<td>No impact.</td>
</tr>
<tr>
<td>Source Tracking</td>
<td>No impact.</td>
<td>No impact.</td>
</tr>
<tr>
<td>Integration (Job Board Accounts and Screening Services)</td>
<td>No impact.</td>
<td>No impact.</td>
</tr>
<tr>
<td>Automated Tasks</td>
<td>No impact.</td>
<td>No impact.</td>
</tr>
<tr>
<td>Product Resources</td>
<td>No impact.</td>
<td>No impact.</td>
</tr>
<tr>
<td>Feature</td>
<td>Contingent Functionality Activation setting is enabled</td>
<td>Contingent Functionality Activation setting is not enabled</td>
</tr>
<tr>
<td>---------</td>
<td>--------------------------------------------------------</td>
<td>----------------------------------------------------------</td>
</tr>
<tr>
<td>Talent Exchange</td>
<td>No impact.</td>
<td>No impact.</td>
</tr>
<tr>
<td>Career Section &gt; Application Flows &gt; Job Specific Agency flow</td>
<td>Contingent Staffing block is available.</td>
<td>Contingent Staffing block is available.</td>
</tr>
<tr>
<td>Career Section Setup</td>
<td>No impact.</td>
<td>No impact.</td>
</tr>
<tr>
<td>Career Section &gt; Statements</td>
<td>No impact.</td>
<td>No impact.</td>
</tr>
</tbody>
</table>

### Requisition Fields to be Used for Contingent

<table>
<thead>
<tr>
<th>Field</th>
<th>Block/Form Where Available</th>
<th>Rules</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date</td>
<td>Profile</td>
<td>Mandatory by default, but it can be made optional.</td>
</tr>
<tr>
<td>Start Time</td>
<td>Profile</td>
<td>The Recruiting setting Offer Default Start Date Hour defines the value of this field. Default is 8 a.m.</td>
</tr>
<tr>
<td>Target End Date</td>
<td>Profile</td>
<td>Mandatory by default, but it can be made optional.</td>
</tr>
<tr>
<td>End Time</td>
<td>Profile</td>
<td>The Recruiting settings Offer Default Start Date Hour and Calculator Default Hourly define the value of this field. Default is 8 a.m and 8 hours per day.</td>
</tr>
<tr>
<td>Estimated Expenses</td>
<td>Contingent Terms</td>
<td>Represents expenses that can be added in order to calculate the total estimated cost.</td>
</tr>
<tr>
<td>Estimated Labor Cost</td>
<td>Contingent Terms</td>
<td>This is a read-only calculated field and it cannot be configured as an input field. The cost is a result of the number of hours per day (Calculator Default Hourly setting) and the number of days the requisition is open, based on the difference between the end date and the start date and the number of days per week, defined in the setting Calculator Default Daily, with 5 days a week being the default. Since it is a calculated field, this field cannot be configured by the system administrator.</td>
</tr>
<tr>
<td>Estimated Labor Cost and Expenses</td>
<td>Contingent Terms</td>
<td>This is a calculated field, and will include the Estimated Labor Cost plus the Estimated Expenses, if the Expenses Reimbursable field is checked. Since it is a calculated field, this field cannot be configured by the system administrator.</td>
</tr>
<tr>
<td>Expenses Reimbursable</td>
<td>Contingent Terms</td>
<td>This check box field is used to decide whether or not the expenses are included in the Estimated Labor Cost and Expenses field upon clicking the calculation option or saving the requisition.</td>
</tr>
<tr>
<td>Maximum Hourly Rate</td>
<td>Contingent Terms</td>
<td>Configure the field such that it is read only for managers – do not allow editing of this field by managers. Defines the maximum hourly rate allowed for the current requisition. This value should in theory come from the template if possible, since it serves to limit the requested hourly rate amount. It also controls the maximum rate an agent can ask while submitting a candidate.</td>
</tr>
<tr>
<td>Field</td>
<td>Block/Form Where Available</td>
<td>Rules</td>
</tr>
<tr>
<td>---------------------------</td>
<td>----------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Requested Hourly Rate</td>
<td>Contingent Terms</td>
<td>This is the requested hourly rate used to inform the agent about what should be submitted.</td>
</tr>
</tbody>
</table>

### Candidates Fields to be Used for Contingent

<table>
<thead>
<tr>
<th>Field</th>
<th>Default Field Visibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staffing Agency Hourly Rate</td>
<td>Career Section (not relevant to recruiters, for integration purpose only).</td>
</tr>
<tr>
<td>Sales Tax must be charged</td>
<td>Career Section, Taleo Recruiting.</td>
</tr>
<tr>
<td>Hourly Rate Paid to the Worker</td>
<td>Career Section (not relevant to recruiters, for integration purpose only).</td>
</tr>
<tr>
<td>Agency Requisition Number</td>
<td>Career Section (not relevant to recruiters, for integration purpose only).</td>
</tr>
<tr>
<td>Worker ID</td>
<td>Career Section (not relevant to recruiters, for integration purpose only).</td>
</tr>
<tr>
<td>Worker Type</td>
<td>Career Section, Taleo Recruiting.</td>
</tr>
</tbody>
</table>
Pipeline Management

• Pipeline Management........................................................................................................443
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• Pipeline Management - Other Configuration Tasks..........................................................447
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Pipeline Management

Pipeline Management provides the ability to distinguish between contacts and candidates and to build a pipeline of contacts who can be tracked and managed separately.

The Talent acquisition process includes the development of contacts, which are individuals who have never been considered for a job, but have the skills, background, and experience an organization is looking for. Pipeline Management provides customers with a way to manage the lifecycle of candidates through the state of being a contact in a pipeline to being considered on an open requisition.

The system now differentiates requisitions as follows: job requisitions used to hire candidates, and Pipeline Requisitions to build a pipeline of candidates.

Two Pipeline requisition types are available:

- Pipeline - General
- Pipeline - Executive
Configuring Pipeline Management

The configuration of the Pipeline Management functionality consists of the following steps.
1. Contact Oracle Support to have the Candidate Pipeline Functionality Activation protected setting activated.
2. Activating Pipeline requisition types.
3. Creating a CSW step of type Pipeline.
4. Creating a candidate selection workflow of type Pipeline.
5. Granting Pipeline Management user type permissions.
6. Optional: Configuring the "Threshold to Collect EEO information (USA)" setting to display the Diversity block in the Career Section in order to collect EEO information.

Activating Pipeline Requisition Types

Prerequisite

Configuration > [Recruiting] Administration > Requisition Types

Steps
1. In the Available Requisition Types list, select Pipeline - General and/or Pipeline - Executive.
2. Click Add.
3. Click Done.

Result
The requisition types are available to Recruiting Center users when they create a requisition.

Creating a CSW Step of Type Pipeline

Prerequisite

Configuration > [Recruiting] Administration > Candidate Selection Workflow

Steps
1. Click the Steps tab.
2. Click New...
3. Complete the name, short name (appears on the Step tab in the Recruiting Center Candidates list), code, and comments.
4. Complete the Step Information field if you want to create custom instructions for the step.
5. Select Pipeline in the Reference Model field.
6. Complete the fields in steps 3, 4, and 5 in all available languages.
7. In the Statuses Usage tab, add statuses to the step.
   You can only add statuses that have a reference model of type Pipeline, Rejected, Declined, or Inactive or statuses that do not have any reference model. Note that the Rejected and Declined statuses are selected by default; you can remove them if desired.
8. In the Actions Usage tab, select actions for the step.
   When creating a step for a Pipeline reference model, the Start Onboarding Process action cannot be used.
9. Click Done.

Result
The step appears in the Steps page and can be used in a candidate selection workflow.

Creating a Candidate Selection Workflow of Type Pipeline

Prerequisite

Configuration > [Recruiting] Administration > Candidate Selection Workflow

Steps
1. Click the Workflows tab.
2. Click New...
3. Enter a name, code, comments, and description.
4. Complete the fields in step 3 in all available languages.
5. Select Available to make the workflow available in the Recruiting Center.
6. Optional: Select Default Workflow to make this workflow the default workflow in the Recruiting Center.
7. In the Steps Usage tab, add one step of type Pipeline.
   a) Click Add...
   b) Select a step.
   c) Click Add.
   Only a step with a reference model of type Pipeline can be added to a pipeline candidate selection workflow.
8. In the Display Context tab, under Requisition Type, select a Pipeline requisition type and click Add.
9. Click Done.

Result
The Pipeline candidate selection workflow can be used by Recruiting Center users in Pipeline requisitions.

Granting Pipeline Management Permissions

Prerequisite
The Manage user types user type permission is required.

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

Steps
1. Click a user type.
2. Click the Recruiting functional domain.
3. Click Edit next to Requisitions.
4. In the Requisition types section, select the Pipeline permissions:
   • Allow access to pipeline - general requisitions
   • Allow access to pipeline - executive requisitions
5. Click Save.
Configuring the Setting to Collect EEO Information (USA)

Prerequisite

Configuration > [Recruiting] Settings

Steps

1. In the Refine by list, select Category, then Equal Employment Opportunity (EEO), and click Refresh.
2. Click the setting name Threshold to Collect EEO information (USA).
3. Click Edit.
4. Set the value to Never.
5. Click Save.

Result

In the case of Pipeline requisitions, the Pipeline reference model is before the NEW status. When the setting is set to Never, it means that there is no threshold applied and the Diversity block in the Career Section will display in order to collect EEO information.
Pipeline Management - Other Configuration Tasks

Adding the Requisition Type Column in Requisitions List

Prerequisite

Configuration > [Recruiting] Administration > List Formats

Steps

1. Click the Requisition tab.
2. In the Show list, select a variation and click Refresh.
3. Click an item in the list.
4. In the Columns in this Context tab, click Add...
5. Select the Requisition field group.
6. Select Requisition Type in the Available Fields list.
7. Click Add.
8. Click Done.

Result

The Requisition Type column appears in the Columns in this Context tab. The column is available to Recruiting Center users when they customize their list formats.

Activating the Self-assigned Task Action Inside a Step

Prerequisite

The Self Assigned Task action must be available (Candidate Selection Workflow / Actions tab)

Configuration > [Recruiting] Administration > Candidate Selection Workflow

Steps

1. In the Actions tab, click the Self Assigned Task.
2. Select Available.
3. Click Done.
4. In the Steps tab, click the step where you want to add the action.
5. In the Actions Usage tab, click Add...
7. Click Done.
8. Click Done.

Result

The action is added to the selected step. When a candidate gets to the step where the Self-assigned Task action was added, Recruiting Center users have the ability to select the Create a self-assigned task option in the Change Step and Status window or Bypass window. If the option is selected, users have to provide a name, due date, description, and comments for the self-assigned task. The task then becomes available under the Tasks tab.
Adding the Most Advanced Progression Status in Candidates List

Prerequisite

Configuration > [Recruiting] Administration > List Formats

Steps

1. Click the Candidate tab.
2. In the Show list, select a variation and click Refresh.
3. Click an item in the list.
4. In the Columns in this Context tab, click Add...
5. Select the All field group.
6. Select Most Advanced Progression Status in the Available Fields list.
7. Click Add.
8. Click Done.

Result

The Most Advanced Progression Status column appears in the Columns in this Context tab. The column Most Advanced Progression Status, represented by the icon , is available to Recruiting Center users when they customize their list formats.

Making the Most Advanced Progression Status Field Available for the Advanced Search

Prerequisite

The Candidate Search option available in the Properties page of the Most Advanced Progression Status field must be selected.

Configuration > [Recruiting] Administration > Candidate Search Page

Steps

1. In the Field Group field, select Basic Profile.
2. In the Available Fields list, select the Most Advanced Progression Status field.
3. Click Add.
4. Click Save.

Result

The field appears in the Selected Fields list. It is available to Recruiting Center users when they customize the advanced candidate search form provided they have access to the advanced search.
Pipeline Management - Permissions and Settings

The following permissions and settings are used to configure the Pipeline Management functionality.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow access to pipeline - general requisitions</td>
<td>Allows Recruiting Center users to create Pipeline requisitions for any type of requisition except executive.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions</td>
</tr>
<tr>
<td>Allow access to pipeline - executive requisitions</td>
<td>Allows Recruiting Center users to create pipeline requisitions for executives.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidate Pipeline Functionality Activation</td>
<td>Activates Pipeline requisition types (General &amp; Executive) as well as an additional workflow step (Pipeline). This setting is a Protected setting that can be activated by Oracle Support only.</td>
<td>Off</td>
<td>Configuration &gt; [Recruiting] &gt; Settings</td>
</tr>
</tbody>
</table>
Evaluation Management

Evaluation Management allows organizations to electronically capture, review and analyze an evaluator's input obtained during a screening process.

Different participants of an organization are involved in the evaluation process. Evaluation Management basically works as follows:

- The Library Manager creates evaluation categories, questions, skills and questionnaires.
- The Library Manager adds evaluation questionnaires to requisition templates.
- Recruiters add evaluation questionnaires to requisitions.
- Recruiters send feedback requests to evaluators.
- Recruiters ask evaluators to evaluate candidates.
- Evaluators provide feedback on candidates they interview.
- Recruiters can view evaluation questionnaires completed by evaluators.
Configuring Evaluation Management

The configuration of the Evaluation Management feature consists of the following steps.

1. **Enabling the Evaluation Questions and Questionnaires Activation setting.**
2. **Granting Evaluation Management permissions.**
3. **Adding Evaluation Management columns in list formats.**
4. **Creating skill rating scales.**
5. **Selecting Evaluation Management message templates.**
6. **Configuring Evaluation Management time zones.**
7. **Selecting Evaluation Management languages.**

### Enabling the Evaluation Questions and Questionnaires Activation Setting

**Prerequisite**

*Configuration > [Recruiting] Settings*

**Steps**

1. Refine the settings list using the *Interview Evaluations* category.
2. Click the *Evaluation Questions and Questionnaires Activation* setting.
3. Click *Edit*.
4. Select *Yes*.
5. Click *Save*.

**Result**

When this setting is enabled, Recruiting Center users have access to the Evaluation Questions Library, Evaluation Questionnaires Library, Evaluation Categories Library, Questionnaires tab in requisition templates, requisitions and candidate submission provided they also have the proper user type permissions.

If you enable the *Evaluation Questions and Questionnaires Activation* setting, it is recommended to turn off the *Interview Management Activation* setting (*Configuration > [Recruiting] Settings*) to avoid confusion for the users. These are two separate and distinct applications and neither functionality works with the other.

### Granting Evaluation Management Permissions

The following Evaluation Management permissions can be granted to users.

<table>
<thead>
<tr>
<th>Permission</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access the question and competency libraries</td>
<td>When this permission is granted, users can access the Libraries tab in the Recruiting Center.</td>
<td><em>Configuration &gt; [SmartOrg]</em> Administration &gt; [Users] User Types &gt; Recruiting &gt; Prescreening and Electronic Feedback &gt; General</td>
</tr>
</tbody>
</table>
| Manage questionnaires, questions, skills and categories | When this permission is granted, users can access the following libraries in the Recruiting Center:  
  - Evaluation Categories  
  - Evaluation Questions | *Configuration > [SmartOrg]* Administration > Users > User Types > Recruiting > Prescreening and Electronic Feedback > Evaluations |
<table>
<thead>
<tr>
<th>Permission</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evaluation questionnaires in requisitions - Access evaluation information</td>
<td>When this permission is granted, users can access the Questionnaires tab in requisitions they can view. They will also see the Add and Remove buttons in the Add Evaluators section.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions &gt; Evaluation questionnaires in requisitions</td>
</tr>
<tr>
<td>Evaluation questionnaires in requisitions - Add and remove questionnaires</td>
<td>When this permission is granted, users who can access the Questionnaires tab in requisitions are also able to add and remove questionnaires.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions &gt; Evaluation questionnaires in requisitions</td>
</tr>
<tr>
<td>Evaluation questionnaires in requisitions - Add and remove evaluators</td>
<td>When this permission is granted, users can add and remove evaluators in requisitions. To be able to add and remove evaluators, users must also have the permission to access the Evaluation section in requisitions.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions &gt; Evaluation questionnaires in requisitions</td>
</tr>
<tr>
<td>Evaluation questionnaires in requisition templates - Access evaluation information</td>
<td>When this permission is granted, users can access the Questionnaires tab in requisition templates they can view.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions &gt; Evaluation questionnaires in requisition templates</td>
</tr>
<tr>
<td>Evaluation questionnaires in requisition templates - Add and remove questionnaires</td>
<td>When this permission is granted, users who can access the Questionnaires tab in requisition templates are also able to add and remove questionnaires.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions &gt; Evaluation questionnaires in requisition templates</td>
</tr>
<tr>
<td>Evaluation questionnaires in candidate submissions - Access evaluation information</td>
<td>When this permission is granted, users can access the Questionnaires tab in candidate submissions to which they have access. They will also see the Add and Remove buttons in the Add Evaluators section.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Candidates &gt; Evaluation questionnaires in candidate submissions</td>
</tr>
<tr>
<td>Evaluation questionnaires in candidate submissions - Remove completed questionnaires</td>
<td>When this permission is granted, users can remove any completed feedback questionnaires in candidate submissions to which they have access.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Candidates &gt; Evaluation questionnaires in candidate submissions</td>
</tr>
<tr>
<td>Evaluation questionnaires in candidate submissions - Add and remove evaluators</td>
<td>When this permission is granted, users can add and remove evaluators in candidate submissions. To be able to add and remove evaluators, users must also have the permission to access the Evaluation section in candidate submissions.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Candidates &gt; Evaluation questionnaires in candidate submissions</td>
</tr>
<tr>
<td>Manage rating scales</td>
<td>This permission controls the display of the &quot;Skills Rating Scales&quot; link in the</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; Users &gt; User Types</td>
</tr>
<tr>
<td>Permission</td>
<td>Description</td>
<td>Location</td>
</tr>
<tr>
<td>------------</td>
<td>-------------</td>
<td>----------</td>
</tr>
<tr>
<td></td>
<td>Evaluation Management Administration menu.</td>
<td>&gt; Recruiting &gt; Prescreening and Electronic Feedback &gt; Evaluations</td>
</tr>
</tbody>
</table>

Important information related to adding and removing evaluators in candidate submissions and requisitions

When users only have the permission to add evaluators in candidate submissions, the evaluators are only linked to candidate submissions.

When users have the permission to add evaluators in requisitions or both in requisitions and candidate submissions, the evaluators are linked to the requisitions and all associated candidate submissions.

When users only have the permission to remove evaluators in requisitions, the evaluators are removed from requisitions only. All previously created candidate submissions are not affected. However, new candidate submissions created after an evaluator has been removed will not have that evaluator.

When users only have the permission to remove evaluators in candidate submissions, the evaluators are removed from candidate submissions only.

When users have the permission to remove evaluators in requisitions as well as in candidate submissions, the evaluators are removed from requisitions as well as from candidate submissions that do not have any requests or completed feedback from the removed evaluator. If a request has been made or an evaluation has been completed, the evaluator is removed from the list of evaluators for that candidate submission and can no longer be sent feedback requests (unless that evaluator is added to the Evaluators section again).

Adding Evaluation Management Columns in List Formats

**Prerequisite**

*Configuration > [Recruiting] Administration > List Formats*

**Steps**

1. Click the *Candidate* tab.
2. Select a variation in the *Show* list.
3. Click the name of a context.
4. In the *Columns in this Context* tab, click *Add*...
5. Select these two fields:
   - Completed Questionnaires: displays the number of completed questionnaires out of the total number of requested questionnaires.
   - Questionnaire Average Score: displays the average score of all completed questionnaires.
6. Click *Add*.
7. Click *Done*.

**Result**

The column appears in the *Columns in this Context* tab. The column is available to Recruiting Center users when they customize their list formats. In the Recruiting Center, the name of the two columns are: Q'naire Avg Score, Completed Q'naires.
Creating Skill Rating Scales

In the Evaluation Management Administration menu, a link "Skills Rating Scales" directs system administrators to the Skills Rating Scales library where they have the ability to create rating scales if they were granted the "Manage rating scales" permission.

The Skills Rating Scales library provides quick filters to filter and search skill ratings according to the following criteria:

- Name of the skill rating scale.
- Status (Active, Inactive, Draft, All).
- Category: categories available in the Evaluation Categories library.
- Scale value: the number of rating values in the rating scale. For example, the rating scale "Needs Development-Meets Expectations-Exceeds Expectations" would have a scale value of three.

Quick filter criteria can be used individually, or several criteria can be used together. Once the skill rating scales are filtered, sorting can also be performed on the list by clicking on the column header.

Creating a Skill Rating Scale

Prerequisite

Configuration > [Evaluation Management] Administration > Skills Rating Scales

Steps

1. Click Create.
2. Complete the fields. See Skill Rating Scale Properties.
3. Click Save.

Skill Rating Scale Properties

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Skill Rating Scale</td>
<td>The name of the skill rating scale. For example: Hourly Employee Scale.</td>
</tr>
<tr>
<td>Short Label</td>
<td>Limited to 30 characters. The short label is not required. However, it is recommended to define one if using the functionality with the Oracle Tap for Taleo application (iPad).</td>
</tr>
<tr>
<td>Select the scale to be applied to ratings</td>
<td>The numerical value selected determines the number of scale labels (text input fields) for that rating scale.</td>
</tr>
</tbody>
</table>
| Rating Value and Rating Label   | The rating value represents the number of labels in the rating scale. The rating label represents the choices displayed to users. For example:
  Skill Rating Scale: Hourly Employee Scale
  Rating Values and Rating Labels:
  - 1: Needs development
  - 2: Meets expectations
  - 3: Exceeds expectations |
<p>| Status                          | Skill rating scales can have one of three statuses:                          |
|                                | • Draft                                                                     |</p>
<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
</table>
|                   | • Active  
|                   | • Inactive  
|                   | When creating a new rating scale, you can only choose between Draft and Active. A rating scale must be saved in the Active status for the Inactive status to become available for selection. Once a rating scale is in the Active status, only grammatical edits should be made. |
| Activated Languages| While creating a new skill rating scale, translations can be created through the Activated Languages drop-down. Languages that have translated content are displayed in blue in the list. Translations should be entered prior to saving the rating scale as active. |
| Category          | The category can be used to classify the skill rating scale. It is optional.                                                                   |

**Configuring Evaluation Management Message Templates**

Evaluation Management message templates are configured in the Evaluation Management Administration menu.

Evaluation Management message templates are provided by default and can be customized. These messages are sent to evaluators to request them to complete an evaluation questionnaire. System administrators can modify the properties of these message templates. If changes are made to the message, it is possible to go back to the message original version by clicking *Revert to Default*.

In version 13B, the character limit for the message template Text field was expanded to accept a considerably larger amount of content. With the increased limit, some impacts to the user experience could potentially be encountered. The issue is only experienced when more than 100,000 characters are pasted into the Text field. When saving the message template, a validation message is displayed warning that the maximum 100,000 character limit has been exceeded. In an effort to prevent browser performance issues, the previously entered, large amount of data is not stored and would need to be reentered and adjusted to fit within the 100,000 character limit.

**Configuring an Evaluation Management Message Template**

**Prerequisite**

The *Manage questionnaires, questions and categories* permission is required.

*Configuration* > [Evaluation Management] Message Templates

**Steps**

1. Click on a message template.
2. Complete the fields. See *Evaluation Management Message Template Properties*.
3. Click Save.

**Specifying the Expiration of the Feedback Request Link in Message Templates**

**Prerequisite**

The *Manage questionnaires, questions and categories* permission is required.

*Configuration* > [Evaluation Management] Administration
Steps
1. Click *Evaluation Expiration*.
2. Enter the number of days after which the link in the feedback request messages will be disabled.
3. Click *Save*.

Displaying the Feedback Request URL as Text in Message Templates

When configuring Evaluation Management message templates, system administrators have the ability to put a URL token in the body of the message and to have the URL displayed as text instead of the entire URL string.

When evaluators receive a feedback request, the URL in the message appears as a hyperlink and when they click the text, they are redirected to the appropriate questionnaire form.

**Displaying the Feedback Request URL as Text**

**Prerequisite**
The *Manage questionnaires, questions and categories* permission is required.

**Configuration > [Evaluation Management] Message Templates**

**Steps**
1. Click on a message template.
2. In the Text field, add the wording where the URL will appear.
   For example, you could type “Please click here to access the evaluation form.”
3. Select the text you want to display as a hyperlink.
   For example, you could select the words "click here" in the above example.
4. Click the link icon  .
5. In the *Link Info* tab:
   a) Select *URL* in the Link Type drop-down.
b) Select <other> in the Protocol drop-down.

c) Select Evaluation URL in the Merge Field drop-down (which only appears after selecting <other>).
The URL field will then display the following value: {#EvaluationURL#}.

6. Click OK.
7. Click Save.

**Result**

The message displays the URL as a hyperlink.

### Evaluation Management Message Template Properties

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>The message template can be active or inactive. When active, the message template can be used in Evaluation Management.</td>
</tr>
<tr>
<td>Include ICS attachment</td>
<td>When selecting Yes, the Appointment.ics file is added to the message template and evaluators are able to add the evaluation request in their email calendar.</td>
</tr>
<tr>
<td>Sender Name</td>
<td>This field is used to provide a generic sender address that displays to the recipient.</td>
</tr>
<tr>
<td>Subject</td>
<td>This is the message header. Tokens can be added to the subject by selecting them from the drop-down list. These tokens will automatically call information from the system and display it in the template.</td>
</tr>
<tr>
<td>Text</td>
<td>This is the message main content. A Rich Text Editor enables users to edit and format the text. Tokens can be added to the text by selecting them from the drop-down list. These tokens will automatically call information from the system and display it in the template.</td>
</tr>
</tbody>
</table>
Selecting Evaluation Management Time Zones

Evaluation Management time zones are configured in the Evaluation Management Administration menu. Time zones must be configured correctly to send evaluation requests.

There are two time zone settings in the Evaluation Management Administration area. System administrators can select which time zones are available for use in Evaluation Management (Configuration > [Evaluation Management] Administration > [Display] Time Zones). They can also select a default time zone for Evaluation Management (Configuration > [Evaluation Management] Administration > [General Configuration] Default Time Zone). The default time zone is used when sending feedback requests. Recruiters can choose different time zones when sending feedback requests, amongst all of the time zones that were activated in Evaluation Management.

By default, the system displays the user's preferred time zone (defined under Recruiting Center > Resources > My Setup > Preferences > Time Zone and also under Configuration > [SmartOrg] Administration > User Accounts > General Preferences > Time Zone). That Recruiting or SmartOrg default time zone must be activated in EM (Configuration > [Evaluation Management] Administration > [Display] Time Zones) to properly reflect this setting in Evaluation Management. In this example, a default time zone in Evaluation Management is not required, however it is recommended to configure the Evaluation Management default to match what is set in Recruiting and SmartOrg. If the user's default time zone is not defined in Recruiting and/or SmartOrg, the system will display the default time zone set in Evaluation Management. If the user’s default time zone in Recruiting/SmartOrg is activated in Evaluation Management and the default set in Evaluation Management does not match the Recruiting/SmartOrg setting, the Recruiting/SmartOrg default will be reflected in Evaluation Management.

The default time zone set in the Career Section Administration menu (Configuration > [Career Section] Settings) and the one set in the Evaluation Management Administration menu (Configuration > [Evaluation Management] Administration > [General Configuration] Default Time Zone) should be identical. Also, the user's preferred time zone is not taken into account (Configuration > General Configuration > Settings > Time Zone).

Selecting Evaluation Management Time Zones

Prerequisite

The Manage questionnaires, questions and categories permission is required.

Configuration > [Evaluation Management] Administration

Steps

1. Click Time Zones.
2. Select the desired time zones.
3. Click Save.

Selecting a Default Evaluation Management Time Zone

Prerequisite

The Manage questionnaires, questions and categories permission is required.

Configuration > [Evaluation Management] Administration
Steps
1. Click Default Time Zone.
2. Select a time zone.
3. Click Save.

Selecting Evaluation Management Languages
Evaluation Management languages are configured in the Evaluation Management Administration menu. System administrators can select which languages are available in Evaluation Management.

Evaluation Management is using a different approach to manage languages. Please consider the following:

- The application language in Evaluation Management (that is, the language used to display UI labels) aligns with the application language usage in Recruiting.
- The content language (that is, the language used to display the content in requisitions and candidate submissions) is preserved during navigation. For example, if a user changes the language of a requisition, the language of the evaluation questions in the requisition will be adjusted accordingly.
- Content languages defined within Evaluation Management must be manually aligned with content languages activated via the Organization Content Languages setting (Configuration > Career Section Administration > Settings).
- The base language in Evaluation Management aligns with the base language usage in Recruiting. The base language of an entity is aligned with the user preferred language. However, please note these differences in Evaluation Management:
  - The base language cannot be modified since no language configuration tool is available.
  - The base language is displayed in the list of evaluation questions.
  - The word (Base) does not appear next to the base language in the language drop-down list.
  - Additional languages do not have statuses but are automatically made available upon saving.
  - Languages for which a translation was provided are displayed in blue.

Selecting Evaluation Management Languages
Prerequisite
The Manage questionnaires, questions and categories permission is required.

Configuration > [Evaluation Management] Administration
Steps
1. Click Languages.
2. Select the desired languages.
3. Click Save.
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## Configuring Candidate File Tabs

In the candidate file, tabs presented to users are governed by permissions and features configuration.

<table>
<thead>
<tr>
<th>Candidate File Tab</th>
<th>Description</th>
<th>Permission and Configuration Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Submission/General Profile</td>
<td>Contains information on prescreening, resume, employment preferences, EEO, etc. The contents of both the job submission and general profile are configured and activated by the system administrator as candidate files in the Taleo Recruiting Administration module. Depending on the candidate card side being viewed, this tab will be either specific Job Submission OR the General Profile.</td>
<td>Always displayed.</td>
</tr>
<tr>
<td>Attachments</td>
<td>Contains resume and other attachments provided by the candidate and attachments provided by the user. Attachments are added with the icon. Job specific attachments are clearly identified from other attachments, and the name of the person who attached the file is also indicated. All attachments are managed centrally from this tab and when a user uploads an attachment, he/she will be able to specify if it will also be visible to the candidate.</td>
<td>Access Attachments tab (Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Candidates) View other attachments (Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Candidates) For any attachments originally created as being only visible by the recruiter (not visible to the candidate), users will only see attachments to the extent that they have been granted access to the submission relating to the attachment. If users are not authorized to view the job submission then they will not be able to view the attachment. For information on attachments, see Attachment.</td>
</tr>
<tr>
<td>Tasks</td>
<td>Contains a list of tasks to perform regarding the candidate. Tasks are self-assigned by users to remind them to complete a future activity.</td>
<td>This tab only appears from the Candidate Submission card side. To be displayed, the feature must be activated and users must also have been granted the permission to manage self-assigned tasks.</td>
</tr>
<tr>
<td>Offers</td>
<td>Contains offers submitted to the candidate, offers from competitors,</td>
<td>Displayed if offer management is used.</td>
</tr>
<tr>
<td>Candidate File Tab</td>
<td>Description</td>
<td>Permission and Configuration Required</td>
</tr>
<tr>
<td>--------------------</td>
<td>-------------</td>
<td>-----------------------------------------</td>
</tr>
</tbody>
</table>
|                    | candidate expectations and requisition offer information.  
The Offers tab and offer content are always job specific and visible only from the job submission view.  
• Competitive offers and current jobs are linked to the candidate and are thus shared between submissions for this candidate. Context based permission ownership is applied based on the owners of any requisition this candidate has applied to.  
• Candidate job offers and expectation offers are linked to the submission and can only be viewed by users who can view that submission. | The Offers tab is displayed on a candidate submission once an offer is created.  
The Offers tab and offer content are never displayed when viewing a candidate’s general profile. |
| Offer Approvals | Contains the most recent offer approval information. | Displayed if offer management and approvals are used.  
The Offer Approvals tab is displayed once an offer approval request is generated. The Offer Approvals tab is visible for any user who can view offers for the candidate submission. |
| Referrer | Contains both employee/candidate referral and agency referral information and actions. | Always displayed if the user can view the candidate’s general profile or job submission.  
Fields in the Referrer tab can be specifically controlled by the field level security configurability. Fields in the Referrer tab are controlled by the same configuration done on these fields when used in the main tab of the candidate file because the data model for these fields is shared. Example: The candidate fields First Name and Last Name are also used for the Referrer’s first name and last name. Therefore:  
• If the user's field security level permissions allow him/her to see the first name or last name for internal and external candidates, the user will see those fields in the Referrer tab.  
• If the user's field security level permissions allow him/her to see |
<table>
<thead>
<tr>
<th>Candidate File Tab</th>
<th>Description</th>
<th>Permission and Configuration Required</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>the first name and last name for internal and external candidates, the user will see the referrer name in the History tab. • If the user's field security level permissions do not allow him/her to see the first name and last name for internal and external candidates, the user will not see those fields in the Referrer tab. • If the user's field security level permissions do not allow him/her to see the first name and last name for internal and external candidates, the user will not see the referrer name in the History tab.</td>
<td></td>
</tr>
<tr>
<td>History</td>
<td>Contains a log of all actions performed on the candidate file, including the date and the name of the user who performed the action.</td>
<td>Always displayed. However, it only allows users to view history tracking related to submissions they are authorized to view. The Attachments tracking category is visible to users who have these two permissions: • Access Attachments tab • View other attachments (Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Candidates) The Offer history tracking is visible to users who have the following permission: • View offers (Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Offers ) Note that if users navigate into the view of a submission they can view but are not authorized to view the offer tab of that submission, then the offer history tracking data will be hidden. All offer history of all types will be hidden – not just “offer” but also the supplementary offer data as well.</td>
</tr>
</tbody>
</table>
Configuring the Candidate Duplicate Check Feature

The Check for Duplicate action allows Recruiting Center users to verify if a candidate already exists in the database.

When selecting the Check for Duplicates action, the system performs a duplicate check against a duplicate check condition created by the system administrator. Candidates matching the condition are displayed in a Quick Search Results list. If two candidate files are duplicates, Recruiting Center users then have the ability to merge the files using the icon.

The configuration of the candidate duplicate check feature consists of the following steps:

1. *Creating a duplicate check condition.*
2. *Granting permission for the duplicate check.*

Creating a Duplicate Check Condition

A duplicate check condition is created to find duplicate candidates in the database.

By default, the following duplicate check condition is provided:

First Name AND Last Name AND Phone Numbers OR Email Address OR Social Security Number

To create a duplicate check, standard fields, user-defined fields, and operators are used.

<table>
<thead>
<tr>
<th>Standard Fields</th>
<th>User-defined Fields</th>
<th>Operators</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address (Line 1)</td>
<td>To use a user-defined field, the <em>field must be made available</em> as a search criterion by selecting the Candidate Search option in the user-defined field properties (Recruiting Administration &gt; Fields &gt; Show User-defined Fields &gt; Edit Field Availability). Note that once a user-defined field is being used in the duplicate check condition, it cannot be deleted from the Fields list nor can it be made unavailable for the candidate search.</td>
<td>AND</td>
</tr>
<tr>
<td>Address (Line 2)</td>
<td>OR</td>
<td></td>
</tr>
<tr>
<td>City</td>
<td>(</td>
<td></td>
</tr>
<tr>
<td>Date of Birth</td>
<td>)</td>
<td></td>
</tr>
<tr>
<td>Email Address</td>
<td></td>
<td></td>
</tr>
<tr>
<td>First Name</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The Email Address field is useful only for customers not enforcing email uniqueness (Configuration > [Recruiting] Settings > Email Uniqueness). It is a Taleo best practice to use email uniqueness to prevent duplicate entries rather than trying to merge duplicates during the review process.

If the condition has been modified, clicking Reset restores the default.

In the example below, the following candidates would be displayed in the results list if the default condition was used.

Condition = First Name AND Last Name AND Phone Numbers OR Email Address OR Social Security Number

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Phone Number</th>
<th>Email Address</th>
<th>Social Security Number</th>
<th>Is this a Duplicate File?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Denis</td>
<td>Smith</td>
<td>111 234-5678</td>
<td><a href="mailto:dsmith@gmail.com">dsmith@gmail.com</a></td>
<td>123 456 789</td>
<td>Yes</td>
</tr>
<tr>
<td>Denis</td>
<td>Smith</td>
<td>111 234-5678</td>
<td><a href="mailto:dsmith@gmail.com">dsmith@gmail.com</a></td>
<td>123 456 789</td>
<td>Yes</td>
</tr>
<tr>
<td>Denis</td>
<td>Smith</td>
<td>111 234-5678</td>
<td><a href="mailto:dsmith@hotmail.com">dsmith@hotmail.com</a></td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Denis</td>
<td>Smith</td>
<td>111 234-1234</td>
<td><a href="mailto:dsmith@gmail.com">dsmith@gmail.com</a></td>
<td></td>
<td>No</td>
</tr>
</tbody>
</table>

To create a duplicate check condition

**Prerequisite**

Configuration > [Recruiting] Administration > [General Configuration] Duplicate Check

**Steps**

1. To add a field in the condition, click on the field located in the Available Fields box, then click Add. The field appears in the Condition box.
2. To add an operator in the condition, click on the operator located in the Available Operators box, then click Add. The operator appears in the Condition box.
3. To remove a field from the condition, click on the field located in the Condition box, then click Remove. The field no longer appears in the Condition box.
4. To remove an operator from the condition, click on the operator located in the Condition box, then click Remove. The operator no longer appears in the Condition box.
5. To move an item in the condition, click on the item then use the left and right arrows.
6. Click Save.
Granting the Permission to Perform a Duplicate Check

To use the Check for Duplicates action in the Recruiting Center, users must be granted the *Merge candidate files* permission.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Merge candidate files</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Candidates</td>
</tr>
</tbody>
</table>

Configuring the Candidate File Merge Feature

Recruiting Center users have the ability to combine several candidate files into one file.

When using the Check for Duplicate action, or when in a candidates list, or after performing a quick search or advanced search, Recruiting Center users can select from two to ten candidate files and merge them using the merge icon 🔄. To verify if the selected candidate files are duplicate files, the system performs a duplicate check against a *duplicate check condition* created by the system administrator. Once the duplicate check is done, the system suggests a master candidate file by selecting the candidate file that contains the most up-to-date information or the candidate file that was first referred in the case of a referral.

The configuration of the candidate file merge feature consists of granting this user type permission.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Merge Candidate files</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Candidates</td>
</tr>
</tbody>
</table>

Configuring the Candidate Comparison Feature

Recruiting Center users have the ability to display candidate files side by side for comparison purposes.

From a requisition-specific candidate list, a user can select two or more candidate files and invoke the Compare action in the More Actions list.

The configuration of the candidate comparison feature consists of enabling a setting and granting a user type permission.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidate Compare Feature</td>
<td>Enables the candidate compare feature.</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use candidate compare</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Candidates</td>
</tr>
</tbody>
</table>
Configuring the Internal Candidate Job Submission Viewing Feature

The viewing of internal candidate job submissions is controlled by a permission.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Constraints</th>
<th>Location</th>
</tr>
</thead>
</table>
| View internal candidate job submissions | Only if this user is an owner of the requisitions  
Only if this user is an owner of the requisitions or a collaborator  
Without restriction | Configuration > [SmartOrg] Administration > User Types > Recruiting > Candidates |

If a candidate is an internal candidate, all of his job submissions will or will not be displayed according to the above permission. The system does not look at each submission to see if it is internal or not. It looks at the profile level to determine if the candidate is internal; if it is internal, the candidate will receive the treatment of this permission.

If a user is granted the View internal candidate job submissions permission, the user will be able to see internal job submissions that he/she owns, that he/she owns or collaborates on, or all internal job submissions depending on the constraint enabled.

If a user is not granted the permission, he/she will not be able to see job submissions linked to internal candidates (as is indicated using the icon).

If a user can view an internal candidate job submission, he/she can view the entire submission, including the History tab. Therefore, the History tab on a submission will never be hidden from a user that can view a submission.

Note that this permission does not affect the user from being able to see an internal candidate’s general profile. General profiles are the initial candidate viewing page for search results and folders. If an internal candidate is placed in a user's folder, a user will be able to view him regardless of what is set on this permission. When performing an advanced search, a user will be able to return general profiles of internal candidates if authorized based on the search permission "Access Internal/External Candidate Criteria".

Sharing Candidate Files

The Candidate Share functionality allows Recruiting Center users to share one or several candidate files with people via email. When sharing a candidate file, the system generates a PDF file containing candidate data.

The share action is represented by this icon and is available in the candidates list and the candidate file. A maximum of 50 candidate files can be shared at once.

Two sharing modes are available (based on specific setting values):

- The legacy mode where one PDF is generated for each candidate being shared.
- The new mode where a single PDF containing the consolidated data and attachments of all shared candidates is generated and stored on the cloud.

The legacy Candidate Share mode

When the legacy Candidate Share mode is used:

- A PDF is generated for each candidate being shared.
• A separate email is sent to each recipient, for each candidate being shared.
• The "Share Candidate Notification" message template is used and contains the PDF as well as the attachments.

**The new Candidate Share mode (aka Flipbook)**

When the new Candidate Share mode is used:

• A single PDF containing the consolidated data and attachments of all shared candidates is generated and stored in the cloud.
• A single email is sent to each recipient (instead of one email per shared candidate).
• The message template called "Share Candidate Notification - Link to Access Shared Candidate Information" is used and contains a link to access the PDF and attachments in the cloud (instead of attaching the PDF file and attachments to the email). Note that token variables such as {Candidate.FullName} can be added to this message template but they will not be populated if more than one candidate is being shared. In such a case, there is only one message for several candidates.
• The generated PDF contains a Table of Contents so that users can easily navigate through the candidate files. Clicking the Bookmarks icon in the PDF displays the Table of Contents.
• If an attachment cannot be converted, a link to access it directly in the cloud is included in the PDF. A conversion log containing all conversion errors for all selected candidates is inserted at the beginning of the PDF. A "place holder" page is placed in PDF where the conversion file was to be located.
• A maximum of 50 candidate files can be shared at once.
• While many common fonts are supported by the PDF converter used to generate PDFs, the system does not support all possible fonts candidates may decide to use as part of the documents they submit during their application.

The new Candidate Share mode converts submission attachments as a PDF file. However, the PDF file may not be a pixel perfect representation of the original attachments. As a result, there will be formatting differences between the original document and the converted PDF version of the document. Starting version 13C MP7, the new Candidate Share mode (Flipbook) embeds links to the original attachments shared. The links to these attachments are provided at the beginning of each candidate section. Users can click these links to open the original attachments. This allows users to download and view shared submission attachments. Users do not need to log in to access these attachments. Note that the PDF conversion process for the new Candidate Share mode supports UTF-8 encoding.

The generated PDF contains links to the original attachments. When sharing candidates, users do not require authentication. The download starts as soon as the user clicks a link. However, when using batch printing to print the PDF, users will require authentication prior to being able to download attachments for security purposes.

The Recruiting setting "Share Other Attachments" does not prevent users from printing a PDF including other attachments. When using bulk printing or when sharing multiple candidates/submissions, users will not see a difference when selecting chosen segments. However, the output will differ if the setting is enabled. For example, the printed document will include other attachments not flagged as relevant to the submission.

**Attachments in the generated PDF**

Attachments can be included when sharing a candidate file. Three options are available:

• Most recent flagged resume
• Visible by candidate (Excludes flagged resume)
• Not visible by candidate (Excludes flagged resume)
History Tracking in the Share Candidate Feature

The history can be included when sharing a candidate file.

If the History option is selected, the tracking events of the shared candidate is included. When sharing a general profile, only the related general profile history is shared. When sharing a job submission, only the history related to that job submission is shared.

Offer history information is included in the file if:

- The user sharing the file has the View offers permission.
- The user selects the Offer option in the Share Candidate assistant.
- The candidate file contains offer data. Note that offer data is not available when sharing multiple candidates.

Candidate Sharing Behavior

When a user is sharing a candidate:

- Only the content that the user is allowed to access or that a company allows to share is available.
- The candidate file content that can be shared is defined by what the user can view. If a section is available to view, it will be available to share.
- Attachments can be shared depending on the user’s ability to see attached files.
- Offer content can be selected for sharing if:
  - The user can view offer content.
  - The file being shared is a job submission.
  - The file contains offer data.
- Referrals can be shared.
- The history tracking can be shared.
- Tasks are never available to share.
- Approvals are never available to share.

When a recipient receives the shared candidate file:

- Sections that contain no data are removed from the shared file even if they were selected. Passport, eSignature and Regulation sub-sections are never included even if they are within a section of the candidate file that was included by the share sender when sending the share file.
- Shared files follow a restricted profile for field level security. Fields with a Confidential security level are never shared, and fields with the General or Restricted security level are always shared, regardless of the sharing user’s permissions. As a result, the shared candidate file may include or exclude content that a user is otherwise able to see while in the Recruiting Center.
- Tasks are never included.
- Approvals are never included.

Sharing Candidate Files - Permissions and Settings

The following permissions and settings are used to configure the candidate file sharing feature.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidate and Job Submission</td>
<td>Determines the method used for sharing candidate and job submission information, including attachments, with recipients. When sharing using a link to an online PDF, a single PDF.</td>
<td>Share using a link to an online PDF.</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Setting</td>
<td>Description</td>
<td>Default Value</td>
<td>Location</td>
</tr>
<tr>
<td>---------</td>
<td>-------------</td>
<td>---------------</td>
<td>----------</td>
</tr>
<tr>
<td><strong>PDF Retention Period for Shared Candidate Information</strong></td>
<td>Specifies the number of days that candidate information will be retained in the system and available online. After the specified period, the candidate information will no longer be available. The maximum retention period is 15 days. This setting only applies when sharing candidate information via a link. Note that there is a hard-coded limit of 60 days. Even if the setting is set higher than 60 days, files will not be retained longer than that.</td>
<td>15</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
</tbody>
</table>
| **Configuration of Sections in the Job Submission/General Profile for the Print and Share Functionalities** | Enables the ability to configure the sections in the candidate general profile and job submission, including attachments, that can be printed or shared. This setting applies to all users who have the permissions to use the print or share functionality. Available values are:  
• All sections can be selected  
• Only the Job Submission/General Profile section and the Attachments section can be selected | All sections can be selected | Configuration > [Recruiting] Settings |
<p>| <strong>Setting</strong> | <strong>Description</strong> | <strong>Default Value</strong> | <strong>Location</strong> |
| <strong>containing the consolidated data and attachments of all shared candidates is generated and stored on the cloud; an email is sent to each recipient and contains a link to access the PDF and attachments in the cloud; the information remains accessible online for 15 days after the date the information was shared.</strong> | | | |
| <strong>When sharing by email, one PDF is generated for each candidate being shared and an email containing the PDF and attachments is sent to each recipient.</strong> | | | |</p>
<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
</table>
| Share Other Attachments       | When enabled, users will be able to include "other attachments" in "Candidate Share" or "Interview Request" actions. "Other attachments" in this case equates to any attachment not directly related to job submission/general profile from which the action is being taken.  

The *Share Other Attachments* setting has been added as a safeguard for companies that are concerned by users gaining access to "other" attachments. Because it is the share sender's security permission that determines what can be shared, this setting safeguards the security of the data from the share recipients where this extra protection is desired. When the setting is enabled, the "Visible by candidates" option in the "Share Candidate" assistant will display other attachments, i.e., attachments visible by the candidate which are not linked to the current submission. | Yes            | Configuration > [Recruiting] Settings        |
| Disable External Candidate Sharing | Confine candidate sharing to members of the groups to which a user belongs.  

To be a recipient of a shared candidate file, certain rules apply. Candidate share recipients presented in the selection wizard are affected by the *Disable External Candidate Sharing* setting.  

When the setting is set to Yes, it is not possible to share the candidate file with external users by typing an email address in the "Share with External Recipients" field. Recipients can only be selected amongst the users displayed in the assistant. To appear in the list of available users, the following conditions must all be met:  

• The user must be active. | No              | Configuration > [Recruiting] Settings        |
<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
</table>
|         | • The user must be able to access the Recruiting Center.  
          • The user must belong to at least one user group matching the user group of the user sharing the candidate file.  
          • If a submission is being shared, the user must have access to the staffing type of the requisition.  
          When the setting is set to No, it is possible to share the candidate file with external users by typing their email address. The list of users in the assistant will contain all active users with access to the Recruiting Center. | | |

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Share Candidates</td>
<td>This permission is required to share candidates.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Candidates</td>
</tr>
<tr>
<td>Access Attachments tab</td>
<td>Attachments can be included when sharing a candidate file.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Candidates</td>
</tr>
<tr>
<td>View other attachments</td>
<td>Attachments can be included when sharing a candidate file.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Candidates</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Message Template</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Share Candidate Notification</td>
<td>Message template used for the legacy Candidate Share mode. The message template contains the PDF as well as the attachments.</td>
<td>Configuration &gt; [Recruiting] Message Templates</td>
</tr>
<tr>
<td>Share Candidate Notification - Link to Access Shared Candidate Information</td>
<td>Message template used for the new Candidate Share mode. The message template contains a link to access the PDF and attachments in the cloud (instead of attaching the PDF file and attachments to the email). Note that token variables such as {Candidate.FullName} can be added to this message template but they will not be populated if more than one candidate is being shared. In such a</td>
<td>Configuration &gt; [Recruiting] Message Templates</td>
</tr>
</tbody>
</table>
Candidate Interview

A candidate interview is a formal meeting to evaluate the qualifications and work experience of a candidate. Recruiting Center users can schedule, update and cancel interviews directly in the Recruiting Center. Attendees invited to a meeting receive an interview notification by email and they add the meeting to their calendars. Each time an interview is scheduled, updated or cancelled in the Recruiting Center, an email message is sent to selected attendees.

Here is how the candidate interview scheduling feature basically works.

A recruiter wants to interview a candidate for a job. For that, the candidate must be at the right interview step/status. From the Candidates list or the requisition-specific candidate list, the recruiter selects the candidate file and chooses the Schedule an Interview action in the More Actions list. The recruiter invites the candidate and can also invite other attendees to the interview meeting. The hiring manager of the requisition is invited by default. However, if the meeting organizer is the hiring manager, the recruiter is invited instead. Non-Recruiting Center users can also be invited to the meeting via their email address.

A default interview invitation message is proposed by the system. The most appropriate message template is pre-selected based on the requisition’s Organization-Location-Job Field structure and the application language. However, it is possible to select another message.

If the recruiter has the appropriate permission, he/she can attach the candidate file and requisition file to the interview being scheduled and the message being sent.

When all the interview details are entered, the recruiter sends the interview meeting invitation.

The candidate, the meeting organizer and the attendees receive the interview meeting invitation by email and they can add the invitation directly into their calendars. If the candidate has no email address, the interview organizer can print the invitation and send it to the candidate by fax or regular mail.

After the interview meeting has been scheduled, the recruiter can view interview scheduling information in the candidate list Interview column and in the candidate file History tab. Note that to the Interview column must have been activated and added to the candidate list by the system administrator.

The recruiter also has the ability to update the interview meeting by changing the attendees, the schedule or other information, and also cancel the interview.

The candidate interview feature generates iCalendar entities that can then be integrated with any mail system that supports this specification, including Microsoft Outlook. Note that events occurring in MS Outlook calendar or any iCalendar system are not managed by Taleo Recruiting. For example, if an interview meeting is modified in Outlook, the new information will not appear in Taleo Recruiting.

MS Outlook 2000 and higher are supported. Other calendar products may be functional but are not officially supported.

When the candidate file and requisition file (or other candidate attachments) are included in the interview meeting invitation, these do not follow in the Calendar meeting.

A candidate can only have one interview scheduled per application at a time. If a candidate has no email address, users can still schedule an interview; they simply need to print the interview invitation and send it to the candidate by fax or regular mail.
When scheduling or updating a 1st interview, the meeting organizer will not be able to add the appointment to his Outlook calendar using the ics link contained in the interview meeting invitation he will receive. This is a Microsoft Office issue that occurs with Outlook 2007 and Outlook 2010 (version 14). This issue is happening to meeting organizers only.

### Candidate Interview - Permissions and Settings

The following permissions and settings are used for the candidate interview feature.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interview Management Activation</td>
<td>Activate interview management functionality. The Schedule an Interview action is then available in the More Actions list</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Confine Meeting Attendees to User Group</td>
<td>Allow meeting requests to be sent only to the members of the groups to which a user belongs</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Meeting Scheduling Sharing Mode</td>
<td>Indicates how the candidate file and requisition file are shared with attendees in scheduling interviews. Possible values for this settings are: • Via Taleo eShare Center: candidate and requisition files (if included) and any candidate attachments are linked in the eShare Center. • Via email: candidate and requisition files (if included) and any candidate attachments are included in the message as attached files. All interviewers receive the same candidate and requisition file view, regardless of the value selected for the Meeting Scheduling Sharing Mode setting or permissions to view information in the system. As a rule, sections in the file are those the user sending the request is authorized to see, sections include General and Restricted fields (never Confidential fields), the Compensation block is never included in the requisition file, and Regulations and Passport</td>
<td>Via Taleo eShare Center</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Setting</td>
<td>Description</td>
<td>Default Value</td>
<td>Location</td>
</tr>
<tr>
<td>-------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------</td>
<td>-----------------------------------</td>
</tr>
<tr>
<td></td>
<td>blocks are never included in the candidate file. All recipients, including the candidate, will get the same email message. In the message body, tokens for Restricted and General fields are resolved (Confidential fields are never resolved). Any files attached directly to the message template are sent via email, regardless of the value selected for the Meeting Scheduling Sharing Mode setting. Candidates will never receive either the attached files or an eShare link, regardless of the value selected for the Meeting Scheduling Sharing Mode setting. A user can be selected as an interviewer and receive related requisition and candidate information even if he/she cannot access such information in the system.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Share Other Attachments</td>
<td>When enabled, users will not be able to include &quot;other attachments&quot; in &quot;Candidate Share&quot; or &quot;Interview Request&quot; actions. &quot;Other attachments&quot; in this case equates to any attachment not directly related to job submission/general profile from which the action is being taken. All candidate facing and non-candidate facing attachments linked directly to the job submission are included. Candidate facing &quot;other&quot; attachments are also included, unless the setting Share Other Attachments is set to No.</td>
<td>Yes</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage interviews</td>
<td></td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Candidates</td>
</tr>
</tbody>
</table>
Files Attached to an Interview Invitation

Users can attach the candidate file and requisition file to the interview being scheduled and the message being sent.

The candidate file attached to the interview meeting never contains the Regulations block and Passport results. Blocks available in the candidate file do not display confidential information. Files attached to the candidate file (for example, a resume) are not included in the interview invitation.

The requisition file attached to the interview meeting never contains the Compensation block. Blocks available in the requisition file do not display confidential information.

User type permissions grant users access to the content of the candidate and requisition files. Depending on the user type permissions granted to the user scheduling the interview, some attendees may not have access to information they normally would have. Note that the candidate will not receive the candidate file nor requisition file.

When the candidate file and requisition file (or other candidate attachments) are included in the interview meeting invitation, these do not follow in the Calendar meeting.

Attachments Sent with the Interview Request

<table>
<thead>
<tr>
<th>Share Other Attachments setting</th>
<th>View Other Attachments permission</th>
<th>Job-Specific</th>
<th>General Profile</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Candidate Facing</td>
<td>Non-Candidate Facing</td>
</tr>
</tbody>
</table>

* The Schedule an Interview action is available for a single candidate job submission. In the situations described above, the user requesting the interview must have the permission to access the Attachments tab in the candidate file or else no attachments can be included.

<p>| Yes | Yes | All candidate facing attachments linked directly to the job submission are included if candidate files are selected to | All non-candidate facing attachments linked directly to the job submission are included if candidate files | Not available | All candidate facing “other attachments” and candidate facing attachments linked to the general profile are included if | Not Available |</p>
<table>
<thead>
<tr>
<th>Share Other Attachments setting</th>
<th>View Other Attachments permission</th>
<th>Job-Specific</th>
<th>General Profile</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Candidate Facing</td>
<td>Non-Candidate Facing</td>
<td>Offer</td>
</tr>
<tr>
<td></td>
<td>be sent by the user sending the interview request.</td>
<td>are selected to be sent by the user sending the interview request</td>
<td></td>
</tr>
<tr>
<td>No</td>
<td>All candidate facing attachments linked directly to the job submission are included if candidate files are selected to be sent by the user sending the interview request.</td>
<td>All non-candidate facing attachments linked directly to the job submission are included if candidate files are selected to be sent by the user sending the interview request.</td>
<td>Not available</td>
</tr>
<tr>
<td>No</td>
<td>All candidate facing attachments linked directly to the job submission are included if candidate files are selected to be sent by the user sending the interview request.</td>
<td>All non-candidate facing attachments linked directly to the job submission are included if candidate files are selected to be sent by the user sending the interview request.</td>
<td>Not available</td>
</tr>
<tr>
<td>No</td>
<td>All candidate facing attachments linked directly to the job submission are included if candidate files are selected to be sent by the user sending the interview request.</td>
<td>All non-candidate facing attachments linked directly to the job submission are included if candidate files are selected to be sent by the user sending the interview request.</td>
<td>Not available</td>
</tr>
</tbody>
</table>
Candidate Interview and Candidate Selection Workflow

The candidate interview feature can be configured in the candidate selection workflow for proper candidate selection tracking.

Candidate selection workflows can be configured by the system administrator so that when users schedule an interview, the candidate’s status automatically changes to a preset value. To automatically change the candidate’s status, the system administrator must activate the Interview Scheduling Behavior option for the statuses in question, that is 1st, 2nd and 3rd interview statuses (available in the Statuses Usage tab of a step).

Example:

A recruiter uses a candidate selection workflow containing the 1st, 2nd and 3rd Interview steps. All three steps have the following statuses:

- To be scheduled
- Scheduled
- Passed

The Interview Scheduling Behavior option is activated for the Scheduled status. The candidate is currently at the 1st Interview step and the To be Scheduled status.

The recruiter schedules an interview for the candidate. When the recruiter sends the interview invitation to the attendees, the status of the candidate automatically changes from To be Scheduled to Scheduled.

The candidate attends the interview as scheduled. The recruiter wants to invite the candidate to a second interview. The recruiter has to perform the following steps:

- Change the status of the 1st Interview step to Passed.
- Move the candidate to the 2nd Interview step and set the status to To be scheduled.
- Schedule a new interview.

Since the Scheduled status is also configured for the 2nd Interview step, the candidate’s 2nd Interview status automatically changes to Scheduled once the interview is sent to the attendees.

When using this functionality, a best practice is to configure the Interview steps with a completion status that indicates the successful completion of the interview (for example, Passed, Successful). This helps to ensure that an interview that is past due is not simply forgotten.
Referring Candidates

A candidate can be referred by several referrers (agents and/or employees) and referral ownership can be set at the candidate profile level, the job submission level, or at both levels.

In previous releases, candidates could be referred on multiple jobs by a single referrer only. The referral ownership was kept at the candidate profile level, encompassing all job submissions done through all means by all actors. Since version 13C, a candidate can have multiple referrers (agents and employees) and candidate information is shared between multiple referrers.

<table>
<thead>
<tr>
<th>How it Works for Agents</th>
<th>How it Works for Referrers (Usually Employees)</th>
<th>How it Works for Referred Candidates</th>
<th>How it works for Recruiters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agents can:</td>
<td>Referrers can:</td>
<td>Candidates can:</td>
<td>Recruiters can:</td>
</tr>
<tr>
<td>• Refer candidates who already exist in the database.</td>
<td>• Refer previously referred candidates.</td>
<td>• Receive emails from multiple referrers.</td>
<td>• See various referrers for the same candidate.</td>
</tr>
<tr>
<td>• Refer an already referred candidate at the job submission level.</td>
<td>• Refer an already referred candidate at the job submission level.</td>
<td></td>
<td>• Might not always know there are referrers associated to a candidate. The fact that no agent is displayed in the candidate profile Referral tab does not mean that no agent referred the candidate. The referral might exist at the job submission level.</td>
</tr>
<tr>
<td>• See candidate information entered by other referrers.</td>
<td>• See candidate information entered by other referrers.</td>
<td></td>
<td>• See only the candidate profile referrer in search list and folder list.</td>
</tr>
<tr>
<td>• Have a maximum number of job submissions referred per requisition.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

To allow agents and employees to refer candidates or candidate submissions that already exist in the database, settings must be configured by your system administrator.

A referrer can be the owner of a candidate job submission and also the owner of the candidate general profile. To support this candidate ownership mode, a setting must be configured by your system administrator. Three modes of ownership are available:

- **Candidate Ownership**: The referrer is the owner of the candidate. Regardless of where the referral occurs (general profile or job submission), there is only one owner.
- **Submission Ownership**: The referrer is the owner of the candidate job submission. The referral ownership is limited to where the job submission occurs. If the referral is done at the job submission level, only the referrer will have ownership of this job-specific submission. Referring a candidate general profile is possible but not recommended.
- **Submission and Candidate Ownership**: The referrer is the owner of the candidate job submission and the candidate general profile. The referral ownership is set on the job-specific submission but also on the candidate if the candidate is not already owned by a referrer.

In the Recruiting Center, when the Candidate Ownership mode is enabled, the candidate submission referrer is displayed in the candidate submission Referral tab. If there is no submission referrer, the candidate referrer is displayed. A submission-specific referrer can only exist if the ownership mode was changed to the Submission
and Candidate Ownership mode or the Submission Ownership mode and was reverted to the Candidate Ownership mode.

In the Recruiting Center, when the Submission Ownership mode or the Submission and Candidate Ownership mode is enabled, only the local referrer is displayed in the candidate submission. If a candidate submission has no referrer, the candidate submission Referral tab is empty even if the candidate was referred at the profile level.

In the Career Section, under the Referrals tab, the display rules are always the same, regardless of the ownership mode selected.

In the Career Section, a referred candidate submission with an active link is always displayed, regardless of the setting enabled or the ownership mode selected. A non-referred candidate submission is only displayed if the candidate was referred. Candidate referrals are created for all referrals when the Candidate Ownership mode or the Candidate and Submission Ownership mode is enabled (they are not created when the Submission Ownership mode is enabled).

Customers can limit the number of candidate submissions a single agent can submit for a specific requisition. To support such a limit, a setting must be configured by your system administrator. When an agent reaches the limit set by the setting, this message is displayed to the agent: "You cannot refer this candidate because you have reached your maximum number of referrals for this requisition."

**Important Information**

If the Candidate Ownership mode is enabled and a candidate is matched to a requisition, no job-specific ownership is created. If the Submission Ownership mode or the Candidate and Submission Ownership mode is enabled, the current ownership is carried over.

When the Submission Ownership mode or the Submission and Candidate Ownership mode is enabled, there are job-specific submissions with various referrers or no referrer. As such, the referrer ownership is only visible in the context where it applies and might not be visible in another context, like a non-referred job submission or a non-referred profile.

### Configuring Candidate Referrals

Several settings are available to configure the referral of candidates.

To allow the referrals of candidates who already exist in the database, the following settings are available.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accept Referrals from Agents for Known Candidates</td>
<td>Determines if agents can refer candidates who already exist in the database.</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Accept Referrals from Employees for Known Candidates</td>
<td>Determines if employees can refer candidates who already exist in the database.</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
</tbody>
</table>

A referrer can be the owner of a candidate job submission and also the owner of the candidate general profile. To support that approach, the following setting are available.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ownership Configuration for Agent and Employee Referrals</td>
<td>Determines the ownership mode for agent and employee referrals.</td>
<td>Candidate Ownership</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
</tbody>
</table>
Three modes of ownership are available:

- **Candidate Ownership**: The referrer is the owner of the candidate. Regardless of where the referral occurs (general profile or job submission), there is only one owner.

- **Submission Ownership**: The referrer is the owner of the candidate job submission. The ownership is limited to where the job submission occurs. If the referral is done at the job submission level, the referrer will only get ownership of this job-specific submission. Referring a candidate general profile is possible, but not recommended.

- **Submission and Candidate Ownership**: The referrer is the owner of the candidate job submission and the candidate general profile. The ownership is taken on the job-specific submission where it has been done, but also taken on the candidate, if the candidate is not already owned by a referrer.

In the Recruiting Center, when the Candidate Ownership mode is enabled, the candidate submission referrer is displayed in the candidate submission Referral tab. If there is no submission referrer, the candidate referrer is displayed. A submission-specific referrer can only exist if the "Ownership Configuration for Agent and Employee Referrals" setting was changed to the Submission and Candidate Ownership mode or the Submission Ownership mode and was reverted to the Candidate Ownership mode.

In the Recruiting Center, when the Submission Ownership mode or the Submission and Candidate Ownership mode is enabled, only the local referrer is displayed in the candidate submission. If a candidate submission has no referrer, the candidate submission Referral tab is empty even if the candidate has been referred at the profile level.

In the Career Section, under the Referrals tab, the display rules are always the same, regardless of the ownership mode selected.

In the Career Section, a referred candidate submission with an active link is always displayed, regardless of the setting enabled or the ownership mode selected. A non-referred candidate submission is only displayed if the candidate was referred. Candidate referrals are created for all referrals when the Candidate Ownership mode or the Candidate and Submission Ownership mode is enabled (they are not created when the Submission Ownership mode is enabled).

In the Career Section, if a referred candidate applied on a job by himself/herself, the referrer can see that referral in the My Referrals tab if the "Display to the referrer submissions for which candidates applied by themselves" property is set to Yes. (Configuration > [Career Section] Administration > Career Sections > Career Portal Pages > My Referrals).

**Important Information**

- When matching a candidate to a requisition, if the Candidate Ownership mode is enabled, there will be no job-specific ownership created. If the Submission Ownership mode or the Candidate and Submission Ownership mode is enabled, the current ownership is carried over.

- When the Submission Ownership mode or the Submission and Candidate Ownership mode is enabled, there are job-specific submissions with various or no referrer. As such, the referrer ownership is only visible in the context where it applies and might not be visible in another context, like a non-referred job submission or a non-referred profile.

Customers can limit the number of candidate submissions a single agent can submit for a specific requisition. To support such a limit, the following setting was created. When an agent reaches the limit set by the setting, this message is displayed to the agent: "You cannot refer this candidate because you have reached your maximum number of referrals for this requisition."
### Maximum number of candidate submissions that an agent can refer per requisition

**Setting**

Limits the number of candidate submissions a single agent can submit on a specific requisition. Zero means unlimited submissions.

**Default Value**

0

**Location**

Configuration > [Recruiting] Settings

### Best Practices

- Require the email address of the referrers and candidates to prevent duplicate candidates.
- Enable the *Email Uniqueness* setting to prevent duplicate candidates (*Configuration > Recruiting Settings*).
- Enable the *Activate the identification of potentially duplicate candidates* setting for agency and referral flows (*Configuration > Career Section Administration > Application Flows > Candidate Personal Information Block*).
- When the Submission Ownership mode or the Submission and Candidate Ownership mode is enabled for a single candidate, make sure the functionality is well known by users. A training may be necessary.
- If activating different ownership modes per job-specific submissions, deactivate the general profile flow (*Configuration > Career Section Administration > Application Flows*).
- Once a referred candidate has been hired and the referrer has been remunerated, the referral link should no longer be displayed to hide future candidate submissions from the original referrer.

### ACE Candidate Alert

The ACE candidate alert allows Recruiting Center users to set a threshold to identify the ideal candidates and to send an email to specific recipients to inform them that ACE candidates were found.

The ACE candidate alert allows the system to identify the candidates who achieve or exceed the ACE alert threshold for a job offer. It identifies top candidates based on their responses to the competencies and questions in the Prescreening section of the requisition file. The ACE candidate alert is based on Required and Asset criteria. Candidates are divided into three groups to help users determine which candidate files to review first:

- **ACE candidates:** Consider these candidates first because they meet all Required criteria and some Asset criteria.
- **Minimally qualified candidates:** Consider these candidates after the ACE candidates because they meet all Required criteria but not Asset criteria.
- **Other candidates:** Do not consider these candidates because they do not meet any Required criteria.

A best practice is to always have the ACE candidate alert activated.

When setting the ACE candidate alert, these options are provided:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A candidate meeting all the required criteria achieves a result of at least x% (0/0)</td>
<td>This option is used to set the minimum result. Select a percentage from the list. At the right of the percentage, the system displays the number of points the candidate must have to match the selected percentage. When changing the percentage, the value to the right is recalculated. Candidates who meet all the required criteria and the result value will be considered ACE candidates. Do not use the percentage weighting option if you do not use the Weight criterion in the Prescreening section of the requisition file. If you utilized weighting on some of the questions you could, if you wish, incorporate into the ACE candidate alert setting as well. For a simple approach, you can start by using 75% weight</td>
</tr>
</tbody>
</table>
### Option

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A candidate meeting all the required criteria has at least x assets out of y</td>
<td>This option is used to set the minimum number of assets. Select a value from the list. Candidates who meet all the required criteria and the minimum number of assets will be considered ACE candidates.</td>
</tr>
<tr>
<td>Identify a candidate as an ACE when either condition is met</td>
<td>This option is used to identify ACE candidates using the result or asset condition.</td>
</tr>
<tr>
<td>Identify a candidate as an ACE when both conditions are met</td>
<td>This option is used to identify ACE candidates using the result and asset conditions.</td>
</tr>
</tbody>
</table>

When setting the ACE candidate alert, Recruiting Center users have the option to send an email to notify specific recipients that an ACE candidate was found. To be an ACE Candidate Alert recipient, a user must meet all these criteria:

- The user must be active.
- The user must have access the Recruiting Center or eShare Response Center.
- The user has access to the requisition type of the requisition.
- The user belongs to the user group of the requisition.

Recruiting Center users can be set up as an ACE Candidate Alert recipient even if they have limited access to information on the candidate file.

All ACE Candidate Alert recipients receive the same candidate file, regardless of permissions to view candidate information in the system. When an ACE Candidate Alert is set, the recipient receives an email with an attached PDF file that contains data from the candidate file. Sections of the candidate file that contain no data do not appear. All PDF files display information as follows regardless of the user’s permissions:

- Fields with the General or Restricted security level are displayed. Fields with the Confidential security level are not displayed.
- Labels in the candidate file are displayed in the Recipient’s language if there is only one recipient; otherwise labels are displayed in the requisition’s base language.
- Values entered in the candidate file are displayed in the job submission language.
- The Regulations block is not included.
- Passport results are not included.
- Candidate attachments are not included.

### ACE Candidate Alert - Permissions and Settings

The following permissions and settings are used for the ACE Candidate Alert functionality.

The requisition file Alert Tab is visible only if users have one of the following permissions:

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>View and manage ACE threshold and alert recipients</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions</td>
</tr>
<tr>
<td>View and manage the &quot;Request More Information&quot; alert</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions</td>
</tr>
<tr>
<td>Setting</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Delay ACE alert</td>
<td>Review candidate files and check for potential ace candidate alert every X hours (0: never check).</td>
</tr>
<tr>
<td>ACE Alert Option Default</td>
<td>Determines which ACE Alert Option to set by default when creating a requisition. Has a dependency on the setting &quot;Submission Scoring Activation&quot;.</td>
</tr>
<tr>
<td>ACE Alert Score Default</td>
<td>Default score for the &quot;Ace Alert&quot; when creating a requisition. The values must be greater or equal to 0 and less than 100.</td>
</tr>
</tbody>
</table>

**Candidate File History**

The History tab in the candidate file contains a log of all actions performed on the candidate file.

When a candidate file is modified, either by the candidate or a user, an event to track this action is generated and is displayed in the candidate file History tab. The name of the user who performed the action is displayed as well as the date and details on the event. Candidate file tracking events belong to one of the following categories:

- Agent and referrer
- Attachments
- Candidate file update
- Candidate information
- Candidate progression
- Comments
- Correspondence
- Questions and competencies
- Regulation
- Resume
- Screening services
- Offer

Users can see attachments and offer history tracking if they have the required permissions.

Comments relating to an event can be added and edited in the History tab if users have the required permissions.

The Correspondence event category allows users to view previously sent correspondence. A user type permission allows users to resend the correspondence directly from the History tab.

**Modifying the Date of an Event**

Users can modify the date of an event and specify when an action on a candidate's file really took place, provided the feature has been activated and they have the required permissions. The use of the actual date enables reports to more accurately reflect user activity in the selection process. There might be a number of reasons why users would want to change certain dates in a candidate's file. For example, if a candidate had an interview on September 15, but that user was only able to enter this information in the system on September 20, the event date would indicate September 20. The user could then change this date to September 15, which would be more accurate. If the date and time related to an event can be edited, they appear as a hyperlink. The event date can only be between the application creation date and the current date.

**Hiding Confidential Information**
When the value of a confidential field is modified, users who do not have the permission to view confidential fields will not see any tracking event in the candidate file Tracking tab. In Recruiting, fields configured with a Confidential security level can be hidden from users who do not have the permission to view confidential fields. If the value of a confidential field is modified, users who do not have the permission to view confidential fields will not see any tracking event in the candidate file History tab regarding that change. Note that if later on, the security level of that confidential field is changed to General or Protected, users will still be unable to see the change in the Tracking tab.

**Candidate File History - Permissions and Settings**

The following permissions and settings are used to configure the display of elements in the candidate file History tab.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default History Event Categories</td>
<td>Indicates the history event categories shown by default.</td>
<td>Attachments, Comments.</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Display Incomplete Application</td>
<td>Display incomplete submissions in candidate list and in candidate search results. This is a Protected setting activated by Oracle Support. This setting does not apply to the Candidate Quick Search. If the Display Incomplete Application setting is not activated, incomplete submissions will be hidden from view.</td>
<td>Yes</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit comments in history summary</td>
<td>This permission is required to modify comments in the candidate file History tab.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Candidates</td>
</tr>
<tr>
<td>Access Attachments tab</td>
<td>Users must have the Access Attachments tab permission AND the View other attachments permission to be able to view the Attachments section of any History tab. If users have the Access Attachments tab permission but not the View other attachments permission, they will not see the Attachment category and associated history items, but they will have access to the Attachments tab showing the job specific attachments. If users have the View other attachments permission but not the Access Attachments tab permission, they will not see the Attachment</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Candidates</td>
</tr>
</tbody>
</table>
### User Type Permissions

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
</table>
|                      | category and associated history items, and they will not have access to the Attachments tab.  
If users do not have the Access Attachments tab permission nor the View other attachments permission, they will not see the Attachment category and associated history items, and they will not have access to the Attachments tab. | Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates |
| View other attachments | For details, see the description for the Access Attachments tab permission. | |
| View offers | The View offers permission and the View and manage offers permission are contextual and a user can have varying levels of access depending on their relationship to the offer. The system will review both permissions and whichever permission grants the greatest access to information will determine whether the Offer history section will appear for the user. For example, a user can view offers without restriction, but can view and manage only offers he owns. The user will see the Offer history on submissions without restriction because this is the highest level access across these two permissions.  
If users have the View offers or View and manage offers permission and they are on a requisition that matches the sub-option permission, they will see the Offer category and associated history items.  
If users have the View offers or View and manage offers permission, but they are on a requisition that does not match the sub-option permission, they will not be able to see the Offer category and associated history items.  
If users do not have the View offers and View and manage offers permission, they will not be able to see the Offer category and associated history items. | Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Offers |
<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>View and manage offers</td>
<td>For details, see the description for the View offer permission.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Offers</td>
</tr>
<tr>
<td>Access requisition-specific candidate lists</td>
<td>In the Recruiting Center, the Show History for list can present information on all job submissions, on job submissions in selection process, or on a specific job submission. When users select the Submissions in selection process or All submissions option, the list will only include history tracking related to submissions that users are authorized to view. The following permissions and settings will affect the behavior: If users do not have the Access requisition-specific candidate lists permission, all candidate submission files and requisition-specific candidate lists will be blocked from the users’ view. These users can still access lists of candidates from candidate search and candidate folders but from these contexts can never navigate to see anything other than the candidate’s general profile while inside the candidate file.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Candidates</td>
</tr>
<tr>
<td>View candidates in steps whose security level is “Restricted”</td>
<td>Users will need this permission to be able to see a candidate that is in a Candidate Selection Workflow step that is restricted. If this permission is not granted, the candidate submission and associated history will not be visible to users.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Candidates</td>
</tr>
<tr>
<td>View internal job submissions</td>
<td>Users will only be able to see internal candidate job submissions if they are granted this permission. If a candidate is internal at the profile level (this icon is present ), then any job submission related to the candidate can be protected from view based on the following permission.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Candidates</td>
</tr>
</tbody>
</table>
New Hire Onboarding

Employee onboarding is the process of integrating a new employee into an organization.

Onboarding begins when a person accepts a position; it can include orientation, communication, filling out forms, getting equipment such as a laptop.

New Hire Onboarding - Permissions and Settings

The following permissions and settings are used to configure the employee onboarding feature.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Onboarding Activation</td>
<td>Activates Onboarding functionalities. This is a protected setting.</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiate an onboarding process for a new resource</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Other</td>
</tr>
<tr>
<td>Cancel an onboarding process in progress</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Other</td>
</tr>
</tbody>
</table>

Automatic Candidate Pooling

The Automatic Candidate Pooling feature allows customers to add autopooling criteria to a requisition or requisition template to find candidates in the database who are available and qualified for a job. Managers can then access the autopool results with a single click.

The Automatic Candidate Pooling feature is typically used in decentralized hiring environments, for example in high volume retail and hourly hiring where managers may have to quickly identify candidates on their own without the assistance of recruiters.

For the Automatic Candidate Pooling feature to be available, the feature must be enabled by the system administrator. Users creating or defining autopooling criteria must be granted the required user type permissions, but no permission is required to access the autopool results.

Autopooling criteria can be added to a requisition via the Autopooling Criteria tab (if autopooling criteria were added to a requisition template, they will be inherited by the requisition). This is like a saved search that managers can use to find candidates who are both available and qualified. The following autopooling criteria may include any criteria from the Advanced Search, plus an additional set of basic criteria. For example:

- Exclude candidates in selection process
- Candidate’s general profile language must match the requisition language
- Exclude expired job submissions (selected by default)
- Exclude rejected candidates - Within the last x days
- Exclude hired candidates - Within the last x days (selected by default)
- Candidate’s place of residence - Within a radius of x kilometers/miles from the primary location of the job opening
- Submissions must match the following organization-location-job field structure
As a best practice, when defining autopooling criteria:

- Define autopooling criteria in requisition templates so criteria are inherited as requisitions are created.
- Define the widest possible set of candidates from the database that would be both qualified and available.
- This way, no time is wasted on unqualified or unavailable candidates. For example:
  - Set Organizations, Locations and Job Fields to only include candidates from other jobs with overlapping skills and/or who applied to nearby locations. Filter by Organization and Location if appropriate (specific country, specific division, etc.).
  - Exclude candidates being considered in another requisition, who were recently hired, whose submissions have expired.
  - Use the parameter to limit results to candidates who live within X kilometers/miles of the primary location of the requisition.

Once autopooling criteria have been defined and enabled, the system will automatically generate a list of candidates matching the criteria anytime on demand. Note that only candidates who have applied on another requisition will be considered. This list of candidates is accessible in the requisition-specific candidate list or in the requisition file via the icon. A maximum of 300 candidates can be displayed. The user then has the ability to:

- View candidate files.
- Match candidates to the current job opening (candidates are moved from the autopool results list to the requisition-specific candidate list, and they can then be moved along the workflow like any other candidate).
- Match candidates to the current job opening and reject them in a single action (which will remove undesired candidates from continuing to appear in the candidate pool for this requisition; note that by default this option is disabled).
- Filter the list of candidates using quick filters defined by the system administrator.
- Sort the list of candidates by clicking a column heading.

When viewing a candidate file, the user may be able to view the other job applications that the candidate has submitted, depending on the permissions he/she was granted.

The user is able to match a candidate to the requisition via the autopooling feature even if he/she was not granted the permission to match candidates to a requisition in general.

The user may also be able to match and reject candidates in one action if he/she was granted the proper permission. When rejecting a candidate, the manager must specify the qualifiers (motives) and provide comments as required by the workflow.

If configured by the system administrator, the Automatic Candidate Pooling feature may also provide the ability to create optional repooling rules which automatically set a candidate's submission to an Inactive status after X days of inactivity. If the autopooling criteria for other jobs include the criteria to exclude candidates who are in a selection process, candidates who are automatically set to an inactive status will no longer be excluded and thus will be included in pool results.

**Configuring the Automatic Candidate Pooling**

**Prerequisite**

*Configuration > [Recruiting] Administration*

**Steps**

1. Under Recruiting Settings, enable the *Automatic Candidate Pooling Enabled* setting.
2. Under List Formats, configure the candidate list format context entitled *List of automatically pooled candidates*.
   a) Select columns for the list format.
b) Put columns in the right sequence.
c) Set column sorting criteria.
d) Configure quick filters. This list format allows the use of the same quick filters as the Advanced Search list format, plus the Shift Availability filter.
e) Activate the list format.

3. Under SmartOrg Administration > User Types > Recruiting > Requisitions, grant the following user type permissions:
   - View autopooling criteria
   - Edit autopooling criteria
   - Perform the "Reject" action from the candidate autopooling list

4. You can define repooling rules within the Candidate Selection Workflow to automatically return candidates to the pool after X days of inactivity:
   a) Under Recruiting Settings, enable the Inactivate Job Submissions Feature setting.
   b) Under Candidate Selection Workflow/Statuses tab, create an inactive status and select Inactive in the Reference Model list.
   c) Under Candidate Selection Workflow/Steps tab, add this inactive status to each candidate selection workflow step in which you want to repool candidates.
   d) Within each desired candidate selection workflow, in the Steps Usage tab, click on the step, select the Inactivate Job Submissions option and indicate the number of days. Note that different steps may have different durations or none at all.

Talent Pool

Talent pools created in Taleo Performance are available in the Recruiting Center.

A talent pool is a list of people nominated by pool collaborators. In Taleo Performance, talent pools can be created at anytime for any purpose, providing the flexibility to track unlimited groups of employees, such as high-potential employees, future leaders, and successors.

In the Recruiting Center, authorized users are able to see talent pools and match employees and candidates to their requisitions, file them into folders for additional pooling functionalities, or contact them directly.

The Talent Pool tab is available in the left panel of the Candidates list.

From the Talent Pool tab, users can select a talent pool to display the candidates and employees included in the pool. Users can also use quick filters (Internal, Referred, In selection process, Employer, Program) and advanced filters to filter the list down to relevant information. An advanced filter of interest is the Employee Potential which allows users to display candidates or employees with a low, medium, or high potential.

As with any other lists, actions can be performed on employees and candidates included in the talent pool using actions in the menu bar, in the More Actions list, and in the contextual action menu. Users can also select another list format or create a personalized list format.
Configuring the Talent Pool Feature

The configuration of talent pools consists of the following steps.

1. Configuring the All Candidates / By Talent Pool list format context. This list format context is available to display candidates and employees included in a talent pool. You can use the default Contact Information list format, you can edit it, or you can configure a new list format from scratch.

2. Granting the following Talent Pool permission.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>View - If this user is the pool owner or a pool user</td>
<td>When the View permission is granted, all pools are displayed to the user. When the View - If this user is the pool owner or a pool user is granted, only the corresponding subset of pools are displayed. If no permission is granted, the Talent Pool tab in the Recruiting Center is not displayed.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Common &gt; Pools</td>
</tr>
</tbody>
</table>

Employee Metrics

Recruiting Center users are able to see employee metrics directly in the Candidates list and candidate file, to use employee metrics fields as advanced filters, and to search employee metrics.

The following key employee metrics are available in the Candidates list and candidate file. For these fields to be available, they must be configured and added in the candidate file user-defined form and in the candidates list format. If included, they are available to anyone based on field level confidentiality definition. If the Show Advanced Filters option is selected for the list format context, employee metrics become available as advanced filters in the Recruiting Center.

<table>
<thead>
<tr>
<th>Employee Metrics in the Candidates List and Candidate File</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competency Rating</td>
</tr>
<tr>
<td>Employee Potential</td>
</tr>
<tr>
<td>Employee Risk of Loss</td>
</tr>
<tr>
<td>Goal Rating</td>
</tr>
<tr>
<td>Last Review Rating</td>
</tr>
<tr>
<td>Promotability Readiness</td>
</tr>
<tr>
<td>Reassignment Candidate</td>
</tr>
</tbody>
</table>

The following key employee metrics are available in the Advanced Candidate Search page. For these fields to be available in the Advanced Candidate Search page, they must have been configured and added by the system administrator. Once added, they are available to anyone authorized to search internal candidates.
### Employee Metrics in the Advanced Candidate Search

<table>
<thead>
<tr>
<th>Employee Metrics in the Advanced Candidate Search</th>
<th>Available Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Review Rating</td>
<td>Greater than or equal to a % between 0 and 100.</td>
</tr>
<tr>
<td>Potential</td>
<td>Low, Medium, High, Not Specified, Does Not Matter.</td>
</tr>
<tr>
<td>Reassignment Candidate</td>
<td>Yes, No, Not Specified, Does Not Matter.</td>
</tr>
<tr>
<td>Readiness for Promotion</td>
<td>Ready Now, Ready in 6 months, Ready in 1-2-3-4-5 years, Not Specified, Does Not Matter.</td>
</tr>
<tr>
<td>Risk of Loss</td>
<td>Low, Medium, High, Not Specified, Does Not Matter.</td>
</tr>
</tbody>
</table>

Note that the Last Review Rating is expressed as a % in the Recruiting Center; in Taleo Performance, it is expressed differently and it is a customizable scale.

### Configuring Employee Metrics in the Candidates List

To have employee metrics available in the Recruiting Center Candidates list, the following configuration steps are required.

1. **Making employee metrics fields available in the Recruiting Center.**
2. **Adding employee metrics columns in candidate list formats:** Once employee metrics fields have been made available in the Recruiting Center, they can be added as columns in candidate list formats. If the Show Advanced Filters option is selected for the list format context, employee metrics become available as advanced filters in the Recruiting Center.
3. **Setting the security level on field content:** This is done with the following user type permissions: “Security level for internal candidates (in view mode)”, “Security level for external candidates (in view mode)”.

### Making Employee Metrics fields Available in the Recruiting Center

**Prerequisite**

*Configuration > [Recruiting] Administration > Fields*

**Steps**

1. Click Candidate.
2. In the Show Fields drop-down list, select Employee Metrics.
3. Click a field.
4. Click Edit Field Availability.
5. Select Taleo Recruiting.
6. Click Save.

**Next Step**

As with any other fields, employee metrics fields are assigned a security level. Organization, Location, and Job Field contextualization and staffing type exceptions are also honored. Note that the Content Required option only displays the Not Required value because employee metrics fields are read-only in the Recruiting Center.

### Adding a Column in a List Format

**Prerequisite**

*Configuration > [Recruiting] Administration > List Formats*
Steps
1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. In the Formats for this Context tab, click a list format.
5. Select the check box next to a column.
6. Click Done.

Setting the Field Security Level for Candidates
Prerequisite
Configuration > [SmartOrg] Administration > User Types
Steps
1. Click on a user type.
2. In the Recruiting functional domain, click Edit next to Candidates.
3. Select the permission Security level for internal candidates (in edit mode).
4. Set the desired security level.
5. Select the permission Security level for internal candidates (in view mode).
6. Set the desired security level.
7. Select the permission Security level for external candidates (in edit mode).
8. Set the desired security level.
9. Select the permission Security level for external candidates (in view mode).
10. Set the desired security level.
11. Click Save.

Configuring Employee Metrics in the Candidate File
To have employee metrics available in the Recruiting Center candidate file, the following configuration steps are required.
1. Making employee metrics fields available in the Recruiting Center.
2. Creating an Employee Metrics user-defined form. You can create the form from scratch or you can use the default form provided with the system. Employee metrics fields that have been made available in Taleo Recruiting can be added to the form.
3. Adding the Employee Metrics user-defined form to a candidate file.
4. Setting the security level on field content: This is done with the following user type permissions: "Security level for internal candidates (in view mode)", "Security level for external candidates (in view mode)".

Making Employee Metrics fields Available in the Recruiting Center
Prerequisite
Configuration > [Recruiting] Administration > Fields
Steps
1. Click Candidate.
2. In the Show Fields drop-down list, select Employee Metrics.
3. Click a field.
4. Click Edit Field Availability.
5. Select Taleo Recruiting.
6. Click Save.

Next Step

As with any other fields, employee metrics fields are assigned a security level. Organization, Location, and Job Field contextualization and staffing type exceptions are also honored. Note that the Content Required option only displays the Not Required value because employee metrics fields are read-only in the Recruiting Center.

Creating a User-defined Form

Prerequisite

Configuration > [Recruiting] Administration > User-defined Forms

Steps

1. Click Create.
2. Select a file type and click Next.
3. Select a form type and click Create. Or, if you want to use the default fields in the form type, select Use the default template.
4. Provide a code, a name, and a description.
5. Add rows, columns and sections using the Toolbox features.
6. In the Field Chooser list, select fields, then drag and drop them in the desired sections.
7. Edit the field properties by selecting a field and scrolling to the Selected Element Properties section at the bottom of the form.
8. Click Save.

Result

The form appears in the User-defined Forms list and is available when creating user-defined files.

Adding a Block in a User-defined File

Prerequisite

The user-defined file must have the Inactive or Draft status.

At least one section must be created in the user-defined file.

Configuration > [Recruiting] Administration > User-defined Files

Steps

1. Click a user-defined file.
2. Click Edit next to Section Ordering.
3. In the Available Blocks section, select a block.
4. Drag and drop the block in the section.
5. Click Save.

Setting the Field Security Level for Candidates

Prerequisite

Configuration > [SmartOrg] Administration > User Types

Steps

1. Click on a user type.
2. In the Recruiting functional domain, click Edit next to Candidates.
3. Select the permission Security level for internal candidates (in edit mode).
4. Set the desired security level.
5. Select the permission Security level for internal candidates (in view mode).
6. Set the desired security level.
7. Select the permission Security level for external candidates (in edit mode).
8. Set the desired security level.
9. Select the permission Security level for external candidates (in view mode).
10. Set the desired security level.
11. Click Save.

Configuring Employee Metrics in the Advanced Search Page

To have employee metrics available in the Recruiting Center Advanced Search Page, the following configuration steps are required.

1. Making employee metrics fields available in the Recruiting Center.
2. Adding employee metrics to the advanced search page.

Making Employee Metrics fields Available in the Recruiting Center

Prerequisite

Configuration > [Recruiting] Administration > Fields

Steps

1. Click Candidate.
2. In the Show Fields drop-down list, select Employee Metrics.
3. Click a field.
4. Click Edit Field Availability.
5. Select Taleo Recruiting.
6. Click Save.

Next Step

As with any other fields, employee metrics fields are assigned a security level. Organization, Location, and Job Field contextualization and staffing type exceptions are also honored. Note that the Content Required option only displays the Not Required value because employee metrics fields are read-only in the Recruiting Center.

Customizing the Advanced Candidate Search Form

Prerequisite

The Candidate Search option in the Properties page of a field must be selected for a field to appear in the Available Fields list.

When customizing the advanced candidate search form, be sure to only include fields in the form that you want Recruiting Center users to use. If a user has the permission to perform an advanced candidate search, he/she will have the ability to use any fields that you have included in the form regardless of viewing permissions for the fields. When search results are displayed, if the user is not allowed to view internal and/or external candidates, the field will appear in the list if the column is present and the word "Confidential" will appear instead of the data in situations where the user cannot view the data.
Configuration > [Recruiting] Administration > Candidate Search Page

Steps
1. Select a field in the Available Fields list.
2. Click Add.
3. Click Save.

Result
The field appears in the Selected Fields list. It is available to Recruiting Center users when customizing the advanced candidate search form provided they have access to the advanced search.

LinkedIn Profile Preview

This feature links LinkedIn and Taleo together using the LinkedIn Profile Preview feature in the Recruiting Center and LinkedIn.

LinkedIn in Candidate File and Candidates List

Once the feature is activated, system administrators can define where the LinkedIn Profile Preview is available to Recruiting Center users.

A block called LinkedIn can be added to any candidate files, that is candidate submission and general profile. The LinkedIn block contains a View link. When the LinkedIn block is added to the candidate file, the LinkedIn View option becomes available in the Candidate Compare feature as well. Access is controlled via field contextualization, security level, and file setup.

A column called LinkedIn can be added to any candidates lists (including Quick Search Results list) by system administrators. When this column is added, a View link is also available.

LinkedIn View Link

When clicking the View link in the candidate file or candidates list:

- The candidate's LinkedIn Profile is displayed if the candidate's LinkedIn ID is present.
- The candidate's LinkedIn Profile is displayed if an exact match to the candidate's e-mail is present in a LinkedIn Profile.
- The LinkedIn Search feature is displayed if the candidate does not have a LinkedIn ID and an exact match to the candidate's e-mail cannot be found. From there, users can view and then select the correct candidate’s profile to view.

When clicking the View link, the system sends the following data to LinkedIn in order to display the candidate’s LinkedIn Profile:

- LinkedIn Unique ID that is stored in the candidate file (if available).
- E-mail address of the candidate.
- First name and last name of the candidate.
- Current employer name of the candidate.
- Current job title of the candidate.
- Country and zip/postal code of the candidate.

When clicking the View link and the LinkedIn Search feature is displayed:

- Search results are based on searching the LinkedIn database based on the candidate’s first name, last name, current job title, and current employer’s name.
- The way the LinkedIn Search works is that only candidates that meet all the requirements are displayed. As a result, users have the ability to remove or change the job title and employer to expand or change search results.
• Once the right candidate’s profile is found, users can select to view the profile. This will then store the candidate’s LinkedIn ID in the candidate file for future preview. If the customer has a LinkedIn corporate account, this action will also send to LinkedIn the Taleo Candidate ID to allow deep linking back to this record from within LinkedIn (provided the user has access to the Taleo Recruiting Center).

• Recruiters can choose to unlink the LinkedIn ID if it is the wrong candidate’s LinkedIn Profile. This action will remove the LinkedIn ID from the candidate file in Taleo. If the customer has a LinkedIn corporate account, the action of unlinking will also remove the Taleo Candidate ID from the LinkedIn record.

• The information displayed in the LinkedIn Preview window is entirely owned and defined by LinkedIn. The content presented will vary depending on the user’s account level with LinkedIn. No corporate license is required for the LinkedIn Preview window to work, but users must be logged into LinkedIn as a user for content to display.

• If the customer has a LinkedIn Corporate Account or a user has a specific Recruiter user account, more information may display in the LinkedIn Preview window.

The actual LinkedIn ID will not be displayed to users. If users can see the field in Taleo, they will only ever see the View link according to any other field contextualization and security behavior.

Users must have a LinkedIn account in order to view the LinkedIn Preview window. The account could just be the basic one that most people have, or could be the higher level of account as well. Users can sign up for a free LinkedIn account simply by going to www.LinkedIn.com.

LinkedIn is responsible for the following:

• The LinkedIn Preview window content.
• The LinkedIn Search window, results and content.
• The storing of the Taleo Candidate ID in LinkedIn.
• The display to see if the candidate is already in Taleo from LinkedIn.

**Best Practices**

Only activate this feature if there are no concerns regarding the transmission of candidate personal data to LinkedIn. Clients will need to acknowledge this during the activation of the feature on Solution Exchange.

The language in which the LinkedIn Preview window is displayed is determined by the display language selected in the user’s LinkedIn account. It is not based on the language in which the user logged into Taleo. Example: A recruiter set the display language in his/her LinkedIn Profile to French. If the recruiter logs into Taleo in English, the LinkedIn Preview window is displayed in French.

The language of the candidate’s profile content in the LinkedIn Preview window is determined by the base language selected in the candidate’s LinkedIn Profile. Example: A candidate set the base language in his/her LinkedIn profile to French. If the recruiter logs into Taleo in English and views the LinkedIn Profile in the LinkedIn Preview window, the content is displayed in French.

This feature is not supported in the Remote Manager Experience.

The LinkedIn field is not displayed in the print, share, correspondence, forms, ACE alerts, or PDF forms generated for approvals or interview requests.

The LinkedIn ID field is not available for use in Integration or Reporting.

Clients may want to purchase a LinkedIn Corporate Account and/or LinkedIn Recruiter license for more advanced functionalities to appear in the LinkedIn Profile window.

### Configuring the LinkedIn Profile Preview

The configuration of the LinkedIn Profile Preview feature consists of the following steps.

1. **Requesting the Activation of LinkedIn Preview and LinkedIn Profile Upload in My Oracle Support.**
2. **Deploying the LinkedIn Certification.**

3. **Sending an email to LinkedIn to have them generate the API Key and Secret Key.**

4. **Adding the API Key and Secret Key in Recruiting Administration.**

5. **Sending the zone name and API Key to LinkedIn.**

6. **Configuring the LinkedIn Preview feature.**

7. **Placing LinkedIn Preview into candidate files.**

8. **Adding LinkedIn Preview in candidate lists.**

---

**Important information regarding the LinkedIn activation as of September 2012:**

- Clients must go to My Oracle Support (MOS) to request the activation of LinkedIn Preview and LinkedIn Profile Upload. The Taleo Solution Exchange is no longer being used for that process.

---

**Requesting the Activation of LinkedIn Preview and LinkedIn Profile Upload in My Oracle Support**

System administrators must create a service request in My Oracle Support (MOS).

The following information must be provided:

- In the summary field, enter "Activate the LinkedIn Preview and the LinkedIn Profile Upload".
- In the description, specify for which zone(s) the feature must be activated.

---

**Deploying the LinkedIn Certification**

Once the system administrator requests the activation in the Taleo Solution Exchange, a request will automatically be sent to Oracle Support to have the LinkedIn Certification deployed.

There are two LinkedIn solutions: LinkedIn Preview and LinkedIn Profile Upload. Both use the same LinkedIn Certification. Once a certification is activated, it is activated for both solutions. Before entering a request, verify if the LinkedIn Certification is not already deployed in the zone.

---

**Sending Email to LinkedIn to Have the API Key and Secret Key Generated**

System administrators must manually send an email to LinkedIn to have them generate the API Key and Secret Key.

An email to LinkedIn must be sent for each LinkedIn solution (LinkedIn Preview and LinkedIn Profile Upload) and for each zone you want to have activated. If both solutions are being activated at the same time, one email by zone can be sent to LinkedIn.

When creating the email, make sure to include all the information below otherwise this could delay the generation of the API Keys by LinkedIn.

---

**Header:**

To: taleointegrations@linkedin.com

From: [client contact email address]

Subject: Request API Keys for LinkedIn [profile and/or preview]

---

**Body:**

Client Name: [client name]
LinkedIn will email the customer contact directly and provide one set of API Key and Secret Key for each zone. Even though it is one set of keys per zone, you must still notify LinkedIn about each solution activation request.

**Adding the API Key and Secret Key in Recruiting Administration**

**Prerequisite**
LinkedIn Certification must be deployed in order to have access to the Candidate Sourcing feature.

System administrators or a Taleo consultant can perform this step.

The *Access integration services configuration* permission is required to view and edit information under Candidate Sourcing.

*Configuration > [Recruiting] Administration > [Integration] Candidate Sourcing*

**Steps**
1. In the Candidate Sourcing Services list, click Sourcing.
2. Enter the API Key and Secret Key that were generated in LinkedIn.
3. Click Save.
4. Click Activate.

**Sending the Zone Name and API Key to LinkedIn**
In order to support deep linking from LinkedIn to candidate files in the Recruiting Center, the zone name and API key must be provided to LinkedIn. This step is only needed if your organization has purchased the LinkedIn Recruiter product. Please see the Taleo Solution Exchange for additional details.

**Configuring the LinkedIn Preview Feature**
The LinkedIn Preview feature is managed by a candidate field called LinkedIn ID that can be configured to be available in candidate files and candidates lists. This field has the same level of security and contextualization options available for all other candidate fields.

Once the LinkedIn Profile protected setting is activated by Oracle Support, the LinkedIn ID field becomes available in the Candidate Fields page, under the Third Party category.

To make the LinkedIn ID field available in the Recruiting Center candidate file and candidates list, you must select the Taleo Recruiting option when configuring the properties of the field. Note that the LinkedIn ID field is not available for use in Career Sections, candidate search, and reports. As with any other fields, the LinkedIn ID field is assigned a security level: General, Restricted, or Confidential. Note that the Content Required option only displays the Not Required value because the LinkedIn ID field is read-only in the Recruiting Center.

The field can be associated to Organizations, Locations, and Job Fields. However, since the General Profile is not contextualized, if the field is in the General Profile or in a list for the General Profile, the contextualization will not apply and will show to all users.
Placing LinkedIn Preview into Candidate Files

To place the LinkedIn Preview feature into the candidate file, system administrators need to add a block called LinkedIn to activated candidate files.

Once the LinkedIn Profile protected setting is activated by Oracle Support, the LinkedIn block becomes available for candidate files.

The LinkedIn View link is in its own block, so it can be added to an existing section, or a new section can be added just for that block. The block layout is not configurable. If the block is in the file and users have the proper security level, they will also see the block in the Candidate Compare feature, but the location is not configurable. See Adding a Block in a User-defined File.

Adding LinkedIn Preview in Candidates Lists

To make the LinkedIn Preview feature accessible from candidate lists, a column called LinkedIn must be added to list contexts.

System administrators can decide to have the LinkedIn Preview feature displayed in any candidate list context. When this column is added, a View link is available to access the LinkedIn Profile Preview. In order to do that, you must add the LinkedIn field to the context. See Adding a Column to a Context.
Requisitions

Configuring the Create Requisition Assistant

When Recruiting Center users create a requisition, the Create a Requisition assistant guides them through the creation. Fields displayed in the assistant depend on several elements configured by system administrators.

Screen 1: Requisition Type Selector

Recruiting Center users may have the ability to select a requisition type when creating a requisition. The following requisition types may be displayed: Professional, Hourly, Campus, Executives, Contingent, Pipeline - General, and Pipeline - Executive.

The Requisition Type Selector is visible if there is more than one requisition type available to the user. If only one requisition type is available, it will be used by default and the Requisition Type Selector will not be displayed.

To allow users to select a requisition type, you must:

1. **Activate requisition types** under Configuration > [Recruiting] Administration > Requisition Types. Requisition types are displayed to users in the order you activated them.
2. Grant users permissions that give access to different requisition types. The Requisition Type Selector will display only the requisition types to which users have access according to these permissions.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow access to professional requisitions</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions</td>
</tr>
<tr>
<td>Allow access to hourly requisitions</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions</td>
</tr>
<tr>
<td>Allow access to campus requisitions</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions</td>
</tr>
<tr>
<td>Allow access to contingent requisitions</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions</td>
</tr>
<tr>
<td>User Type Permission</td>
<td>Location</td>
</tr>
<tr>
<td>----------------------</td>
<td>----------</td>
</tr>
<tr>
<td>Allow access to executive requisitions</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions</td>
</tr>
<tr>
<td>Allow access to pipeline - general requisitions</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions</td>
</tr>
<tr>
<td>Allow access to pipeline - executive requisitions</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions</td>
</tr>
</tbody>
</table>

If the Contingent Functionality Activation setting is set to No, the Contingent requisition type will not be displayed in the Requisition Type Selector of the assistant.

If the Candidate Pipeline Functionality Activation setting is set to No, the Pipeline - General and Pipeline - Executive requisition types will not be displayed in the Requisition Type Selector of the assistant.

**Screen 2: Requisition File Selector**

The Requisition File Selector will be visible only if more than one requisition file variation is selected in the user's configuration profile (Configuration > [SmartOrg] Administration > [Users] Configuration Profiles > Requisition File Creation).

**Screen 3: Requisition Template, Hiring Manager, Department, Position, Job Role**

There are a number of combinations of fields you can choose to display to Recruiting Center users after they select the Requisition Type. For example, these combinations may include Requisition Template only, meaning the user will select an existing requisition template, like Accounting, and then some of the fields will automatically be completed, based on how the requisition template was set up. Requisition Template and Hiring Manager so even more information can be automatically completed on the new requisition.

The Create a Requisition Assistant will present Recruiting Center users one or two fields based on the following preference sequence:

- Job Role* (if activated) else Position (if activated) else Requisition Template
- Department (if activated) else Hiring Manager (if activated) else nothing
To enable these fields, you must either enable a setting or make the field available to Recruiting Center users.

<table>
<thead>
<tr>
<th>Field in the Create Requisition Assistant</th>
<th>Enabled by</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position</td>
<td>Enable Position setting (Configuration &gt; [Recruiting] Settings)</td>
</tr>
<tr>
<td></td>
<td>Position field (Configuration &gt; [Recruiting] Administration &gt; Fields &gt; Requisition)</td>
</tr>
<tr>
<td>Department</td>
<td>Enable Department setting (Configuration &gt; [Recruiting] Settings)</td>
</tr>
<tr>
<td></td>
<td>Department Autofill Activation setting (Configuration &gt; [Recruiting] Settings)</td>
</tr>
<tr>
<td></td>
<td>Department field (Configuration &gt; [Recruiting] Administration &gt; Fields &gt; Requisition)</td>
</tr>
<tr>
<td>Hiring Manager</td>
<td>Hiring Manager field (Configuration &gt; [Recruiting] Administration &gt; Fields &gt; Requisition)</td>
</tr>
<tr>
<td></td>
<td>Note that the Hiring Manager field will be prefilled automatically if the user has selected a Default Hiring Manager “ in his/her user preferences (Resources &gt; My Setup &gt; Preferences).</td>
</tr>
<tr>
<td>Job Role</td>
<td>Job Role field (Configuration &gt; [Recruiting] Administration &gt; Fields &gt; Requisition)</td>
</tr>
<tr>
<td>Requisition Template</td>
<td>Nothing to configure</td>
</tr>
</tbody>
</table>

Depending on which settings and fields are enabled, fields in the Create a Requisition Assistant will be displayed accordingly.

<table>
<thead>
<tr>
<th>Fields Displayed in the Assistant</th>
<th>&quot;Enable Position&quot; setting</th>
<th>&quot;Enable Department&quot; setting</th>
<th>&quot;Hiring Manager&quot; field</th>
<th>&quot;Job Role&quot; field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisition Template</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Requisition Template and Hiring Manager</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>No (or if template mandatory)</td>
</tr>
<tr>
<td>Requisition Template and Department</td>
<td>No</td>
<td>Yes</td>
<td>Irrelevant</td>
<td>No (or if template mandatory)</td>
</tr>
<tr>
<td>Position and Hiring Manager</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Position and Department</td>
<td>Yes</td>
<td>Yes</td>
<td>Irrelevant</td>
<td>No</td>
</tr>
<tr>
<td>Job Role and Department</td>
<td>Irrelevant</td>
<td>Yes</td>
<td>Irrelevant</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Fields Displayed in the Assistant | "Enable Position" setting | "Enable Department" setting | "Hiring Manager" field | "Job Role" field
--- | --- | --- | --- | ---
Job Role and Hiring Manager | Irrelevant | No | Yes | Yes

* Note that if Template is mandatory, Job Role will not be presented because it is not associated to a template. Position might indirectly become mandatory in the Create a Requisition Assistant.

The Hiring Manager field may be automatically filled if configured as such. See Default Hiring Manager Field.

**Screen 4: Organization-Location-Job Field**

The last set of fields presented in the Create a Requisition Assistant are Organization, Location, and Job Field. These fields are always visible.

Note that Location or Organization can be defaulted to the department value and made read-only based on the following settings:

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Link Requisition Location to Department Location</td>
<td>This is a protected setting that can be activated by Oracle Support. If the setting is set to Yes, if there is a department selected for the current requisition, then the location of the requisition will be changed for that of the department, and the Location field will be read-only. If the setting is set to Yes, when a department is selected for the current requisition, if this department has NO location specified, then the requisition location will stay unchanged and will be editable.</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Setting</td>
<td>Description</td>
<td>Default Value</td>
<td>Location</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------</td>
<td>-----------------------------------------</td>
</tr>
<tr>
<td>Link Requisition Organization to Department Organization</td>
<td>This is a protected setting that can be activated by Taleo Support. If the setting is set to Yes, if there is a department selected for the current requisition, then the organization of the requisition will be changed for the one of the department, and the Organization field will be read-only. If the setting is set to Yes, when a department is selected for the current requisition, if this department has NO organization specified, then the requisition location will stay unchanged and will be editable.</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
</tbody>
</table>

Other Information Regarding the Create a Requisition Assistant

In the Create a Requisition Assistant, the Default Hiring Manager field may be filled automatically if the user has selected a default hiring manager in his/her preferences (Resources > My Setup > Preferences).

Screens 3 and 4 may be deactivated if the Requisition File Automatic Filling setting is enabled in the user's configuration profile. However, it is recommended to not activate this setting because the content of the requisition form depends on the selections made in screens 1, 2, 3, and 4 of the assistant.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
</table>

Create Requisition Action - Required Permissions

To create requisitions in the Recruiting Center, users must have the following permissions.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create requisitions</td>
<td>Configuration &gt; [SmartOrg] Administration&gt; User Types &gt; Recruiting &gt; Requisitions &gt; General</td>
</tr>
<tr>
<td>View requisitions</td>
<td>Configuration &gt; [SmartOrg] Administration&gt; User Types &gt; Recruiting &gt; Requisitions &gt; General</td>
</tr>
<tr>
<td>Allow access to n requisitions</td>
<td>Configuration &gt; [SmartOrg] Administration&gt; User Types &gt; Recruiting &gt; Requisitions &gt; Requisition Types</td>
</tr>
<tr>
<td>Note: For a requisition type currently active.</td>
<td></td>
</tr>
</tbody>
</table>
# Configuring Requisition File Tabs

In the requisition file, tabs presented to users are governed by permissions and configurations.

<table>
<thead>
<tr>
<th>Requisition File Tab</th>
<th>Description</th>
<th>Permission and Configuration Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisition</td>
<td>Contains all the details of the job based on what has been configured and activated by the system administrator as the requisition file in the Recruiting Administration module.</td>
<td>Always displayed. For details on the Requisition tab content, see [Content Displayed in the Requisition Tab.](#)</td>
</tr>
<tr>
<td>Alerts</td>
<td>Allows you to set the ACE candidate alert to be informed when the ideal candidate is found.</td>
<td>Displayed only if the requisition file has a Prescreening section. One of the following permissions must be granted: View and manage ACE threshold and alert recipients (Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions) View and manage the &quot;Request More Information&quot; alert (Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions)</td>
</tr>
<tr>
<td>Attachments</td>
<td>Contains attachments for the requisition.</td>
<td>The Attachments requisition field must be configured as available in Recruiting (Configuration &gt; [Recruiting] Administration &gt; Fields &gt; Requisition). Users authorized to view the Attachments field based on their field level security permission will be able to view the Attachments tab (Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions &gt; Security level for requisitions). When the Attachments tab is displayed, users can view the attachments contained in the tab.</td>
</tr>
<tr>
<td>Approvals</td>
<td>Displayed when an approval request has been generated. The tab appears for all users that can view the requisition. When no approval request has been generated, the Approvals tab is hidden. This tab provides an easy means to</td>
<td>Displayed only if an active approval path has been defined. Once the first approval path is created, it will always appear for anyone who has access.</td>
</tr>
<tr>
<td>Requisition File Tab</td>
<td>Description</td>
<td>Permission and Configuration Required</td>
</tr>
<tr>
<td>----------------------</td>
<td>-------------</td>
<td>---------------------------------------</td>
</tr>
<tr>
<td></td>
<td>access and review the most recent approval information for the requisition. Authorized users can also modify or resend approval requests from this page.</td>
<td></td>
</tr>
<tr>
<td>Posting and Sourcing</td>
<td>Provides access to posting and sourcing features such as career section posting, job board distribution through eQuest, staffing agents, non-electronic media.</td>
<td>Access Posting and Sourcing (Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Sourcing)</td>
</tr>
<tr>
<td>Autopooling Criteria</td>
<td>Contains autopooling criteria.</td>
<td>View Autopooling criteria (Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions)</td>
</tr>
<tr>
<td>History</td>
<td>Contains a log of all actions performed on the requisition file, including the date and the user who performed the action.</td>
<td>Always displayed.</td>
</tr>
<tr>
<td>Reports</td>
<td>Allows users to define if a daily recruiting report will be sent to individuals regarding the status of the requisition's progress.</td>
<td>View and manage the daily recruiting report (Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions)</td>
</tr>
</tbody>
</table>

### Configuring the Content Displayed in the Requisition Tab

The Requisition tab in the requisition file is always displayed. However, the content presented to users is configurable and fields or sections may be hidden or not configured for inclusion.

<table>
<thead>
<tr>
<th>Content</th>
<th>Configuration</th>
</tr>
</thead>
<tbody>
<tr>
<td>The user’s configuration profile is used to define which file is to be used for viewing or editing a requisition. For details, see Configuration Profile.</td>
<td>View or Edit Requisition File (Configuration &gt; [SmartOrg] Administration &gt; Configuration Profiles)</td>
</tr>
<tr>
<td></td>
<td>Note that if a configuration profile was not defined for a user, Requisition File 1 is used.</td>
</tr>
<tr>
<td>Field configuration is used to define field behavior that is, if the field is available or not, if content is required for the field, the confidentiality level of the field, the OLF contextualization, the staffing type exception. For details, see Field.</td>
<td>Configuration &gt; [Recruiting] Administration&gt; Fields &gt; Requisition</td>
</tr>
<tr>
<td>File configuration is used to include sections, sub-sections, and fields according to the file linked and defined to be Requisition File 1, 2 or 3. For details, see Candidate and Requisition File Setup, User-defined File, and User-defined Form.</td>
<td>Configuration &gt; [Recruiting] Administration&gt; Requisition File Setup</td>
</tr>
<tr>
<td></td>
<td>Configuration &gt; [Recruiting] Administration&gt; User-defined Files</td>
</tr>
<tr>
<td></td>
<td>Configuration &gt; [Recruiting] Administration&gt; User-defined Forms</td>
</tr>
</tbody>
</table>
Fields included in the file are displayed based on the field security level permission. For details, see Field Security Level.

Security level for requisitions (in view mode) (Configuration > [SmartOrg] Administration> User Types > Recruiting > Requisitions)

Sections of information are displayed based on permissions.

Access Prescreening Information (Configuration > [SmartOrg] Administration> User Types > Recruiting > Requisitions)

View Compensation section in requisitions (Configuration > [SmartOrg] Administration> User Types > Recruiting > Requisitions).

### Configuring Requisition/Staffing Type

The requisition/staffing type configuration consists of the following steps:

1. **Activating requisition types.**
2. **Adding the Requisition Type column in the requisition list format context.** This is a best practice for customers using multiple requisition types.
3. Granting one or several of the following user type permissions to that Recruiting Center users have access to different requisition types and indirectly, different pools of candidates.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow access to professional requisitions</td>
<td>Configuration &gt; [SmartOrg] Administration&gt; User Types &gt; Recruiting &gt; Requisitions</td>
</tr>
<tr>
<td>Allow access to hourly requisitions</td>
<td>Configuration &gt; [SmartOrg] Administration&gt; User Types &gt; Recruiting &gt; Requisitions</td>
</tr>
<tr>
<td>Allow access to campus requisitions</td>
<td>Configuration &gt; [SmartOrg] Administration&gt; User Types &gt; Recruiting &gt; Requisitions</td>
</tr>
<tr>
<td>Allow access to contingent requisitions</td>
<td>Configuration &gt; [SmartOrg] Administration&gt; User Types &gt; Recruiting &gt; Requisitions</td>
</tr>
<tr>
<td>User Type Permission</td>
<td>Location</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Allow access to executive requisitions</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Requisitions</td>
</tr>
</tbody>
</table>

### Activating a Requisition Type

**Prerequisite**

*Configuration > [Recruiting] Administration > Requisition Types*

**Steps**

1. Select a requisition type in the Available Requisition Types list.
2. Click Add.
3. Use the up and down arrows to order the requisition types in the list.
   - The order you select here will be reflected in the Recruiting Center when users select a requisition type in the requisition wizard.
4. Click Done.

**Result**

The requisition type is available to Recruiting Center users when creating a requisition.

### Adding a Column in a List Format

**Prerequisite**

*Configuration > [Recruiting] Administration > List Formats*

**Steps**

1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. In the Formats for this Context tab, click a list format.
5. Select the check box next to a column.
6. Click Done.

### Reopening Requisitions

The Reopen Requisition action allows Recruiting Center users to reopen a requisition previously filled or canceled, with the option to cancel the current hiring or to add new openings.

The Reopen Requisition action provides two options:

- Add Openings: Users can enter a specific number of additional openings or select Unlimited to have an unlimited number of openings.
- Cancel the Hiring of Candidates: This option will be displayed only if there is at least one hired candidate for the requisition.

### Configuring the Reopening Requisition Action

The configuration of the Reopen Requisition action consists in configuring specific settings and permissions.

The Reopen Requisition action is available to users if:
• The Ability to Reopen Requisitions setting is set to Yes.
• The Reopen a filled or cancelled requisition permission was granted to users.
• The requisition status is Filled or Canceled.

When a user is doing the Reopen Requisition action from a canceled requisition, if the Restart Approval Process After "Cancel" Step setting is set to Yes, the status of the requisition will be changed to Draft and the Request Approval action will be triggered. Note that this action does not apply to requisitions that were only draft then cancelled.

When a user is doing the Reopen Requisition action from a filled requisition, if the Restart Approval Process After "Fill" Step setting is set to yes, the status of the requisition will be changed to Draft and the Request Approval action will be triggered.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ability to Reopen Requisitions</td>
<td>Allow the reopening of filled and canceled requisitions.</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Settings</td>
</tr>
<tr>
<td>Restart Approval Process After &quot;Cancel&quot; Step</td>
<td>Restart the approval process when reopening a requisition after it has been canceled</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Settings</td>
</tr>
<tr>
<td>Restart Approval Process After &quot;Fill&quot; Step</td>
<td>Restart the approval process when reopening a requisition after it has been filled</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Settings</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reopen a filled or cancelled requisition</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Requisitions</td>
</tr>
</tbody>
</table>

Requisition Posting Process

Requisition posting consists of publishing a requisition in order to have candidates applying on the job.

Once a requisition has been created and approved, the next step is to post it. Here is a basic posting and sourcing process. System administrators create a master Source Tracking list which is used by recruiters and candidates. Recruiters post requisitions to Career Sections. Recruiters can post to additional sources such as job boards, agencies and also use gateways to send out requests for sourcing help. Candidates apply to jobs and complete the Source Tracking information. Some tracking is automated if the candidates are coming from certain job boards. They can also put in event ID's from advertisements. Once the source of the candidate is tracked, recruiters then can view the information in the candidate file.

Accessing the Posting and Sourcing feature

There are several ways to access the Posting and Sourcing feature:

• When a requisition is ready for posting or already posted, you can click the Status Detail link in the requisitions list and you will be taken to the Posting and Sourcing tab of the requisition.
• From the More Actions menu within the requisition file.
• From the Posting and Sourcing tab within the requisition file.
• From the contextual action menu in the requisitions list.
• From the Tasks channel, the Ready for Sourcing link will take you directly to a list of requisitions that need to be posted.
Places and services to post requisitions

Depending on what your organization has activated and your permissions, the Posting and Sourcing feature provides several services to post requisitions:

- Internal or external career sections.
- Mobile career sections: Customers can specify if a career section can be accessed from mobile devices. When candidates receive a message on their mobile device regarding a new job opening and decide to take a look at the job while using their mobile device, candidates are automatically redirected to the mobile career section and are able to view and apply for the job. System administrators specify if the career section is a mobile career section and then link the standard career section to a mobile career section. When a requisition is posted to a standard career section, the system automatically posts the requisition to the mobile career section to which the standard career section is linked. In the Recruiting Center, when posting a requisition, the mobile career section to which a standard career section is linked is not displayed in the Career Sections list. This is to prevent users from posting requisitions directly to a mobile career section.
- eQuest: This is the doorway to post requisitions on any job board. A requisition must be posted on a career section before being posted on eQuest.
- Staffing agents: Users can ask an advertising agency to post an ad.
- Non-electronic media such as newspapers, magazines and trade publications, billboards and broadcasting. A list of preferred non-electronic media can be created in My Setup, under Preferences.
- Gateways such as internet mining.

Important information about Mobile career sections

When posting a requisition, the system dynamically calculates the posting start date and end date for the mobile career section. The posting start date and end date on the mobile career section are based on the dates of the standard career section to which the mobile career section is linked.

- If the mobile career section is linked to a single standard career section, the posting start date and end date of the standard career section are used.
- If the mobile career section is linked to multiple standard career sections, the earliest start date among the standard career sections is used; the latest end date among the standard career sections is used.

When posting a requisition to a standard career section, the requisition is simultaneously posted to the mobile career section to which the standard career section is linked (if applicable). However, when a standard career section is linked for the first time to a mobile career section, all requisitions currently posted on the standard career section will be posted to the mobile career section. This posting process is set up to start a few minutes after the two career sections are linked and the duration required to post the requisitions will depend on the volume of postings available on the standard career section.

When unposting from all the Career Sections, users are not receiving the message to select to unpost from the Job Boards (eQuest). Therefore, users must also go into the Job Board (eQuest) and select to Unpost All from there as well.

When posting a requisition to the Non-Electronic Media, the Internet Mining or the Sourcing Strategy, some pieces of information are missing such as default agency, requisition details, OLF, hiring manager, description, qualifications and correspondence preview. It is recommended that users review the requisition details before posting to any of these posting options.
Requisition Posting Permissions

Permissions are granted to Recruiting Center users so they can post requisitions.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Posting and Sourcing</td>
<td>This permission provides access to the requisition Posting and Sourcing tab.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Sourcing</td>
</tr>
<tr>
<td>Post requisitions</td>
<td>When a user receives a Ready for Sourcing task, the user must have the &quot;Post requisitions&quot; permission to be able to complete the task.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Sourcing</td>
</tr>
<tr>
<td>Extend posting and unpost</td>
<td></td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Sourcing</td>
</tr>
<tr>
<td>Post to staffing agents/agencies</td>
<td></td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Sourcing</td>
</tr>
<tr>
<td>More posting permissions are available.</td>
<td></td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Sourcing</td>
</tr>
</tbody>
</table>

The "Post requisitions" permission is controlling both the posting to Career Sections as well as Job Boards. The "Extend posting and unpost" permission is controlling the extend posting and the unposting on Career Sections, Job Boards, and Staffing Agencies. The "Post to staffing agents/agencies" permission is only controlling the posting to staffing agents/agencies.

Social Job Invite

Ability for both candidates and users to easily share jobs via their social network or by email.

The Social Job Invite feature is available in the Career Sections and in the requisition Posting and Sourcing tab.

Note that this feature is not part of the Taleo Anywhere solution. It does not replace the RSS & Facebook feature which allows the sending of jobs by creating a search query.

Career Section

The Social Job Invite feature replaces the Send this Job to a Friend feature in the Career Section. Candidates have the option to select one of many social job sites or email options to send the job to someone in their friend network list, or to simply post on their wall.

The Social Job Invite feature is available on the customer’s Career Sections, in the following portal pages:

- Job List
- Personalized Job List
- Job Description
- Basic Search
- Advanced Search
The system will create a URL link back to the first posted external Career Section Job Description page for the requisition being shared (the Career Section selected will not necessarily be the Career Section where the candidate is, unless that is the first posted external Career Section). The job reference URL will also have the source name embedded in it. When a candidate selects the link to apply, if the source in the URL matches the source name of an active source of type Social Network that is part of the requisition source list then that will be the source that is pre-filled into the submission. If the source is not found in the requisition source list, then the system will pre-fill the source "Other" under the Social Network source type, as long as that source is part of the requisition source list. If that source is also not in the requisition source list, then no source will be pre-filled.

If the job is unposted from the Career Section used in the URL before the candidate selects the link, the standard message indicating that the job is no longer available will be displayed.

Additional sources can be added to support more details in the source tracking in Recruiting Administration. Sources must be created under the Social Network source type. The source name must equal the source name in the provided list. The source name is not case sensitive.

When candidates choose to share jobs through social networks they must be logged in, or have a valid user account to log in to the third party sites and share.

To obtain a list of the social site services currently supported by this feature as well as their assigned source name, refer to the document entitled Source List Names for Social Media.xls. Note that this list is subject to change without prior notice.

**Requisition Posting and Sourcing tab**

A Share link is available in the requisition Posting and Sourcing tab. This option is only available when a job is posted to an external Career Section.

The system will create a URL link back to the first posted external Career Section Job Description page for that requisition. If the job becomes unposted from the Career Section used in the URL before candidates select the link, they will receive the standard "Job is no longer available" message.

There is no way to unpost a requisition from the Social Network sites using Taleo. There is no history tracking when requisitions are posted using the Share option.

When linking to a social job site, this feature will link to the social site the user is already logged onto, and not something that can be controlled in Taleo. Therefore, the user, if wanting to post to the company fan page/account, will need to log into that social site using the company credentials.

### Configuring the Social Job Invite Feature

The configuration of the Social Job Invite feature consists in configuring settings and permissions.

The property *Enable job invitations through social networks* is available in career portal pages. It must be enabled for the Social Job Invite feature to be available.

<table>
<thead>
<tr>
<th>Career Portal Page Property</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable job invitations through social networks</td>
<td>Configuration &gt; [Career Section] Administration &gt; Career Sections &gt; Career Portal Pages &gt; Job Description</td>
</tr>
<tr>
<td>Enable job invitations through social networks</td>
<td>Configuration &gt; [Career Section] Administration &gt; Career Sections &gt; Career Portal Pages &gt; Job List</td>
</tr>
<tr>
<td>Enable job invitations through social networks</td>
<td>Configuration &gt; [Career Section] Administration &gt; Career Sections &gt; Career Portal Pages &gt; Personalized Job List</td>
</tr>
</tbody>
</table>
Users must be granted the *Access the posting through social networks feature* permission to have the ability to post requisitions to social networks via the Posting and Sourcing tab of the requisition.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access the posting through social networks feature</td>
<td>Configuration &gt; [SmartOrg] User Types &gt; Recruiting &gt; Sourcing</td>
</tr>
</tbody>
</table>

To have access to the Posting and Sourcing tab, users must be granted the *Access Posting and Sourcing* permission.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Posting and Sourcing</td>
<td>Configuration &gt; [SmartOrg] User Types &gt; Recruiting &gt; Sourcing</td>
</tr>
</tbody>
</table>

If a user type has the *Post requisitions* permission, then the *Access the posting through social networks feature* permission is enabled by default. If the user type does not have the *Post requisitions* permission, then the *Access the posting through social networks feature* permission is not enabled by default.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post requisitions</td>
<td>Configuration &gt; [SmartOrg] User Types &gt; Recruiting &gt; Sourcing</td>
</tr>
</tbody>
</table>

The recruiting source *Other* is available under the Social Network source type. If a source is not in the source list for the requisition, the system will post the requisition to the Other source of the Social Network source type. If the source is also not in the list, then the source will not default in for the candidate.

<table>
<thead>
<tr>
<th>Recruiting Source</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Sources &gt; Source Type tab &gt; Social Network</td>
</tr>
</tbody>
</table>
Offers

Configuring Offers

The configuration of offers consists of the following steps.

1. Configuring offer fields.
2. Configuring the offer form.
3. Adding the RSOffer step in the candidate selection workflow.
4. Configuring offer letters.
5. Configuring the Offer channel.

Configuring Offer Fields

The configuration of offer fields is done in the Offer Fields feature in the Recruiting Administration menu.

When editing or creating an offer field, system administrators specify the following:

- The field availability in the Recruiting Center.
- The field required content, that is whether it is required or not for saving.
- The security level of the field (general, restricted or confidential).
- The Organization-Location-Job Field structure associated to the field, if any.
- The exceptions based on staffing types being used.

For details on how to modify offer standard fields and create offer user-defined fields, see Configuring Fields.

When configuring requisition fields in the Recruiting Administration menu, all offer user-defined fields that are part of "offer terms" appear in the listing. Offer user-defined fields are displayed because they are available for use in the requisition context. The configuration of the fields is intermixed. That is, if an offer field is configured in the requisition area, that configuration will impact that field and how it is configured in the offer area as well.

To avoid confusion, it is possible to filter requisition user-defined fields to display or not offer fields. The Show Fields filter contains the following values:

- All
- Requisition
- Offer
- Department

This table provides explanations on certain requisition offer fields to avoid confusion.

<table>
<thead>
<tr>
<th>Field</th>
<th>Mapped to</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Currency - Compensation Section</td>
<td>Mapped to the Currency field in the requisition file Compensation section. Also mapped to the Currency field in the offer grid (job submission Offers tab).</td>
<td>This field is offer related.</td>
</tr>
<tr>
<td>Currency</td>
<td>Mapped to the currency field in the requisition file Contingent section.</td>
<td>This field is not offer related.</td>
</tr>
<tr>
<td>Field</td>
<td>Mapped to</td>
<td>Notes</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>---------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Currency - Bonus Section</td>
<td>Mapped to the Currency - Bonus Section field in the requisition file Budget section.</td>
<td>This field is not offer related.</td>
</tr>
<tr>
<td>Currency - Budget Section</td>
<td>Mapped to the Currency - Budget Section field in the requisition file Budget section.</td>
<td>This field is not offer related.</td>
</tr>
<tr>
<td>Maximum Salary</td>
<td>Mapped to the Annualized Salary field in the offer grid (job submission Offers tab).</td>
<td></td>
</tr>
<tr>
<td>Minimum Salary</td>
<td>Mapped to the Salary (Pay Basis) field in the offer grid (job submission Offers tab).</td>
<td>The Salary (Pay Basis) field is updated by two actions (besides manual edits): 1) When copying the minimum requisition pay to this field within the offer grid. 2) When the user calculates compensation by pay basis.</td>
</tr>
</tbody>
</table>

The following offer fields are available in the offer form. They have calculation relationships and it is recommended that the offer form layout be configured to group them together:

- Annualized Salary
- Salary (Pay Basis)
- Pay Basis

When configuring requisition offer fields, both standard and user-defined fields, a distinct configuration of the Content Required attribute is done for the requisition and the offer context. All other contextualization of these fields (that is Security Level) is shared between requisition and offer field configurations.

**Configuring the Offer Form**

The configuration of the offer form is done in the Offer Field Layout feature in the Recruiting Administration menu.

Once offer fields have been configured, system administrators define the layout of the offer form. Both standard and custom offer fields can be positioned in the offer form. The layout consists of specifying in which category/section of the offer grid the field will be displayed (top section, general terms, bonuses, details) and the order in which the field will be displayed. Fields for a specific section must be sequentially grouped together. If a field is configured to display in any context, it will appear in the grid and system administrators will define the placement of the field. If a field is not configured to display in a given context, it will be omitted from the offer grid and the rest of the fields will slide up in position to accommodate the field's absence.

**Adding a Field to the Offer Form**

**Prerequisite**

Offer fields must first be created. See *Creating a User-defined Field.*

**Configuration**  >  [Recruiting] Administration  >  [Fields] Offer Field Layout

**Steps**

1. Click Add...
2. Select a field to include in the form.
3. Click Add.
4. Click Done.

**Result**
The field appears in the Field Layout - Offer page.

**Positioning Fields in the Offer Form**

**Prerequisite**
Both standard and custom offer fields can be positioned in the offer form.

For custom fields to appear in the Field Layout - Offer page, you must first create them. See *Creating a User-defined Field*.

**Configuration > [Recruiting] Administration > [Fields] Offer Field Layout**

**Steps**
1. In the Field Layout - Offer page, for each field select a value under Category to specify in which section of the form the field will be placed.
2. Select a number under Line to specify on which line in the section the field will be placed.
3. Click Apply.

**Adding the RSOffer Step in the Candidate Selection Workflow**
The RSOffer step is a step that can be included in a candidate selection workflow to allow users to use the offer management module.

The RSOffer step is different than the regular Offer step. It must be included in the candidate selection workflow to trigger the Offer Management dynamic action buttons in the Recruiting Center.

The RSOffer step must be placed before the Hire step. The RSOffer step cannot be customized or edited (except for qualifier groups and qualifiers that can be added to specific statuses).

The RSOffer step has the following statuses:

<table>
<thead>
<tr>
<th>RSOffer Step Available Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offer to be made</td>
<td>Initial status of the Offer step.</td>
</tr>
<tr>
<td>Draft</td>
<td>Offer terms have been started and saved, but not approved.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>A draft offer has been created and then cancelled prior to routing for approval or extending to the candidate.</td>
</tr>
<tr>
<td>Approval in progress</td>
<td>Offer has been routed for approval.</td>
</tr>
<tr>
<td>Approval rejected</td>
<td>Offer has been rejected.</td>
</tr>
<tr>
<td>Approved</td>
<td>Offer has been approved.</td>
</tr>
<tr>
<td>Extended</td>
<td>Offer has been extended to the candidate.</td>
</tr>
<tr>
<td>Rescinded</td>
<td>After the offer has been extended or the candidate has accepted the offer, the user (company) rescinds/revokes the offer.</td>
</tr>
<tr>
<td>In negotiation</td>
<td>Offer was extended to the candidate. The user marked the candidate as wanting to negotiate the offer. If a new offer should be created, the user will need to rescind the offer in order to create a new offer. If a new offer is not required, then either</td>
</tr>
</tbody>
</table>
### RS Offer Step Available Status

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refused</td>
<td>Offer was extended to the candidate. The user marked the candidate as refusing the offer. A new offer can be created at this point.</td>
</tr>
<tr>
<td>Accepted</td>
<td>Offer was accepted by the candidate.</td>
</tr>
<tr>
<td>Reneged</td>
<td>After the candidate has accepted the offer, the candidate refuses the offer (goes back on his or her word).</td>
</tr>
<tr>
<td>Rejected</td>
<td>After the offer has been rescinded to a candidate, the user should status the candidate as Rejected in the Offer step. This will allow another offer to be created and extended.</td>
</tr>
<tr>
<td>Has declined</td>
<td>After the offer has been refused or reneged by the candidate, the user should status the candidate as Has Declined in the Offer step. This will allow another offer to be created and extended.</td>
</tr>
</tbody>
</table>

### Adding a Step to a Candidate Selection Workflow

**Prerequisite**

The step must be activated in order to add it to the candidate selection workflow.

There is no limit on the number of steps that can be used in a candidate selection workflow.

- [Configuration > [Recruiting] Administration > Candidate Selection Workflow](#)

**Steps**

1. Click the Workflows tab.
2. Click a candidate selection workflow.
3. Under the Steps Usage tab, click Add...
4. Select a step.
5. Click Add.
6. Click Done.

### Configuring Offer Letters

Offer letters are created via the Message Templates feature in the Recruiting Administration menu.

There are a number of message templates and paragraphs related to offers. You may want to examine these to see what your organization will use and see if you want to create additional templates and paragraphs.

### Configuring the Offer Channel

If your organization is using the Offer Management module and wants the Offer channel activated on the Recruiting home page, you will need to contact Oracle Support.
Adding Channels and Links to a Center Stage

**Prerequisite**
The center stage must be in the inactive or draft status.
The Center Stage Configuration user type permission is required.

**Configuration** > [Recruiting] Administration > Center Stage

**Steps**
1. Click on the name of a center stage.
2. Click Edit next to Channels and Links.
3. Click Add next to Channels and Links.
4. Select channels and links.
5. Click Select.
6. Click Save.

**Result**
When a user associated to that center stage will access the Recruiting Center, the channels and links will appear.

**Next Step**
Ordering channels and links as well as columns in the center stage.

Offer - Permissions and Settings

The following permissions and settings can be used to configure offers.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offer-related permissions are available in the Recruiting - Offers functional domain.</td>
<td></td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Type &gt; Recruiting &gt; Offers</td>
</tr>
<tr>
<td>Create Offers</td>
<td>The <code>Create offers</code> permission works in combination with the <code>View and manage offers</code> permission. The <code>View and manage offers</code> permission gives a user the ability to edit an existing offer. The <code>Create offers</code> permission adds the ability to see the Create Offer action. The <code>View offers</code> permission without the other two permissions allows users to see offers but not to create or edit them. To create offers, users must be granted the “View and manage offers” permission as well as the “Create offers” permission.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Type &gt; Recruiting &gt; Offers</td>
</tr>
</tbody>
</table>
### User Type Permission

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>View and manage offers</td>
<td></td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Type &gt; Recruiting &gt; Offers</td>
</tr>
<tr>
<td>View offers</td>
<td></td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Type &gt; Recruiting &gt; Offers</td>
</tr>
</tbody>
</table>

### Setting

<table>
<thead>
<tr>
<th>Setting</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Many offer settings are available. To easily access these settings, it is possible to refine the list by using the Offer category filter.</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
</tbody>
</table>

---

### Offers and Candidate Selection Workflows

Candidate selection workflows may be configured to contain an Offer step or an RSOffer step.

**Candidate Selection Workflow and Offer step**

Using the Offer step is a simplified way to track offer activity in a candidate hiring process without enabling the entire Offer Management module functionality. Placing this step in a workflow will not enable the use of the Offers tab and Offer Approvals tab. A candidate selection workflow containing an Offer step allows users to move candidates from one step to another using standard actions (Change Step/Status, Move, Revert).

When adding the Offer step to a candidate selection workflow, the following actions are available to users via the More Actions list:

- Make an offer.
- Reject candidates.
- Candidate has declined.

**Candidate Selection Workflow and RSOffer step**

The RSOffer step is a special candidate selection workflow step created for the Offer Management module. The Offer Management module provides the tools for the creation of offers, offer approval, offer extension to the candidate, and capture of the candidate response. Users are also be able to capture competitive offer information as well as candidate current and future expectations.

With this type of workflow, instead of moving candidates using standard actions (Change Step/Status, Move, Revert), specific offer-related actions are presented in the More Actions list as they become an appropriate next activity in the Offer process.

System administrators are responsible for adding the RSOffer step in the appropriate candidate selection workflows. The RSOffer step must be placed before the Hire step. The RSOffer step cannot be customized or edited (except for qualifier groups and qualifiers that can be added to specific statuses).

When adding the RSOffer step to a candidate selection workflow, authorized users are able to:

- Create offers.
- Extend offers verbally, in writing, and electronically.
- Send offers.
- Capture a candidate response.
- Capture a candidate expectations.
- Capture a candidate current job terms.
• Capture competitive offer information.
• Approve offers.
• etc.

Extending More Offers than Positions Available

Recruiters may have the ability to create and extend multiple offers for a single position.

Your organization may choose to activate the Extend More Offers than Positions feature globally, for all requisitions. This is done by enabling the recruiting setting "Extend More Offers than Positions". When this setting is not enabled, recruiters can only extend one offer per position.

You may also activate this feature at the requisition level, by including it as a field in requisitions. This is done by activating the requisition field called "Extend more offers than positions available". You then need to add the field to a requisition form and then include the form in a requisition file for use in the Recruiting Center. Once activated, recruiters will see the option "Extend more offers than positions available" is available in requisitions.

Extending an Offer Electronically (E-Offer)

Recruiting Center users have the ability to extend offers electronically so that candidates can view and respond to these offers on line.

Two E-Offer options are available:
• The standard electronic offer.
• The advanced electronic offer that requires Taleo Transitions. There can only be one Advanced E-Offer process in use at a time for each zone.

Standard Electronic Offer

Customers can use the Standard Electronic Offer feature to extend offers electronically to candidates. Candidates will then access the career section to respond to the offer on line.

To send offers electronically, the Electronic Offers setting must be set to the proper value, users must be granted the permission to extend offers electronically, and the candidate selection workflow must contain the RSOffer step.

The E-Offer process starts as soon as an offer is ready to be extended. This can be done when the status is Approved (if an approval cycle is needed) or Draft (if an approval cycle is not needed or is configured to be skipped). In the Extend Offer window, recruiters click Extend in writing, then select E-Offer. When an offer is extended electronically, a tracking event is created in the candidate file History tab indicating that an electronic offer was extended.

Candidates receive an email notification inviting them to access a secure career section portal to view the offer on line. Candidates click the URL link in their email notification, they are directed to the career section portal where they need to log in, they are then directly brought to the Offers tab where they can view the offer details and attachments, if any. They can also print the offer and its attachments. Candidates then decide to accept or refuse the offer and they must e-sign the offer by providing their full name and unique identifier. The electronic signature is mandatory but it is not validated and therefore any data can be entered.

The Full Name and Unique Identifier labels can be changed by customers.

When candidates accept an offer, the time and date of their e-signature is displayed at the bottom of the accepted offer page, along with the full name of the candidate who signed it. The unique identifier or specific other data which candidates entered is not displayed on the page.
When candidates accept an offer, the offer remains visible in the career section for future reference. When candidates refuse an offer, the offer disappears from the career section. When candidates have multiple concurrent offers, for example a candidate could be hired for a summer job and a long-term permanent position, the career section Offers tab lists all the offers, that is offers that still need a response and offers that were accepted. If an offer has an expiration date and that date is reached and the candidate has not yet responded to the offer on line, the offer disappears from the career section. If the candidate has accepted the offer before the expiration date, then the accepted offer remains visible in the career section for future reference. If the candidate refuses the offer before the expiration date, then the offer disappears from the career section.

As soon as candidates respond to the offer, recruiters receive an email notification. This notification is a configurable message template which contains the candidate's response. This notification can be modified to provide any other information and can also be sent to additional recipients like the Hiring Manager. Depending on the candidate's response, the candidate status is automatically changed to Offer - Accepted or Offer - Refused, and recruiters can then move the candidate to the next step in the candidate selection workflow.

It is not possible to build auto-progression rules that would bring candidates forward in the candidate selection workflow beyond the next step. The email notification sent to recruiters could instruct them to do so manually for each candidate.

Recruiters can capture the offer response on behalf of candidates after they have extended the offer. For example, if a candidate contacts the recruiter to give his/her response before responding to the offer on line, then the recruiter can capture the response. This can give recruiters the opportunity to capture decline motives or to put the offer into the In Negotiation status. If the response entered by the recruiter is Accepted, then the offer will continue to be displayed in the career section for the candidate to view, just like any accepted electronic offers. Note that the offer will show as being accepted but it will not show the full name of the candidate at the bottom of the offer letter page because the candidate did not enter his/her own electronic signature. If the response entered by the recruiter is Refused, then the offer will disappear from the career section just like when candidates refuse an offer themselves.

It is also possible for recruiters to send an offer again once the offer has been extended. For example, an offer was extended in writing via email or printed letter and the recruiter wants to also send it by E-Offer to make it visible on line in the career section. Similarly, if an offer has already been extended and sent as an E-Offer, recruiters can still send it again via email or printed letter.

In standard electronic offers, users can adjust the offer and then extend/send it again. The mere act of adjusting the offer will require that the user rescind the already-accepted offer and create a new offer so that it can be extended again.

**Advanced Electronic Offer using Taleo Transitions**

Customers who have more complex electronic offer requirements can configure Transitions-based advanced electronic offer workflows for use in Taleo Recruiting.

Some customers might require additional eSignatures, notifications extended to include additional people, calls to partner services, different tasks for executives. Clients like those who have more complex requirements might consider using the "Transitions version" of electronic offers because offer workflows in this version can be configured to accommodate a wide variety of needs.

To send offers electronically using Taleo Transitions, the Electronic Offers setting must be set to the proper value, users must be granted the permission to extend offers electronically, and the Candidate Selection Workflow (CSW) must contain the RSOffer step.

The E-Offer process starts as soon as an offer is ready to be extended. This can be done when the status is Approved (if an approval cycle is needed) or Draft (if an approval cycle is not needed or is configured to be skipped). In the Extend Offer window, recruiters click Extend in writing, then select E-Offer. When an offer is
extended electronically, a tracking event is created in the candidate file History tab indicating that an electronic offer was extended.

Candidates may receive an email notification (if the Transitions process was configured like that) inviting them to access a secure career section portal to view the offer online. Candidates click the URL link in their email notification, they are directed to the career section portal where they need to log in, they are then directly brought to the Tasks tab where they can view the offer details and attachments, if any. They can also print the offer and its attachments. Candidates then decide to accept or refuse the offer and they must complete any mandatory fields which may include an electronic signature.

As soon as candidates respond to the offer, the system task that must be configured into the process will then change the candidate status to Offer - Accepted or Offer – Refused, depending on the candidate's response. This adds a line to the History of the candidate's submission in the Recruiting Center, capturing the candidate's response. Then, recruiters or any other assignees can receive a configurable email notification (if the process is configured like that), which can contain the candidate's response, any e-signature information if desired, and any other data fields. The recruiters can then move the candidate to the next step in the CSW, while the rest of the Transitions process can also continue automatically in parallel.

It is also possible for recruiters to send an offer again once the offer has been extended. For example, an offer was extended in writing via email or printed letter and the recruiter wants to also send it by E-Offer to make it visible online in the career section. Similarly, if an offer has already been extended and sent as an E-Offer, recruiters can still send it again via email or printed letter.

As before, recruiters still retain the ability to capture the offer response on behalf of candidates after they have extended the E-offer, and before the candidates respond to it online themselves. This changes the status in the CSW to Offer - Accepted or Offer - Refused, depending on the candidate’s captured response. Capturing this response in the Recruiting Center has no immediate effect on the offer letter that is still displayed to the candidate in the Career Section. However, the candidate’s electronic response will not change the CSW status because the offer response was already inputted by the recruiter, and the offer is no longer in the Extended status. The offer letter will continue to be displayed in the Tasks tab as long as the process is running.

Just as recruiters can track any process, they can also track the progression of the E-Offer process in the Transitions Center. They can also view their current tasks regarding an E-Offer process in the Transitions Center. Recruiters might receive an email notification (if such notification is configured) as soon as candidates respond to an advanced E-Offer.

### Configuring the Standard Electronic Offer

The configuration of the standard electronic offer feature consists of the following steps.

1. **Enabling the Electronic Offers setting.**
2. **Granting the Extend Offers Electronically permission.**
3. **Configuring Electronic Offer message templates.**

For details on how to configure the Advanced Electronic Offer using Taleo Transitions, refer to the *Transitions Configuration Guide.*

### Enabling the Electronic Offers Setting

**Prerequisite**

*Configuration > [Recruiting] Settings >*

**Steps**

1. Refine the settings list using the *Offer* category.
2. Click the *Electronic Offers* setting.
3. Click *Edit.*
4. Select *Standard Electronic Offer*.
5. Click *Save*.

**Result**
Recruiters can extend offers electronically if they have the required user type permission, and candidates will access the career section Offers tab to accept or refuse the offer.

**Granting the Extend Offers Electronically Permission**

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

**Steps**
1. Select a user type.
2. Click *Recruiting*.
3. Click *Edit* next to Offers.
4. Select *Extend Offers Electronically*.
5. Click *Save*.

**Result**
Recruiters can select the E-Offer option when extending offers to candidates, and candidates will access the career section Offers tab to accept or refuse the offer.

**Configuring Electronic Offer Message Templates**
Configure message templates created for electronic offers.

<table>
<thead>
<tr>
<th>Message Template</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>EOffer Candidate Invitation</td>
<td>Standard notification for candidates when they have been extended an electronic offer.</td>
<td>Configuration &gt; [Recruiting] Message Templates</td>
</tr>
<tr>
<td></td>
<td>This message template can be modified. When configuring the message template, you can enter</td>
<td></td>
</tr>
<tr>
<td></td>
<td>any email address of the candidate in the TO line. You can put more than one recipient in the</td>
<td></td>
</tr>
<tr>
<td></td>
<td>TO line, but only the candidate will be able to access the career section.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>A new token is available to redirect the candidate to the career section Offers tab:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>{CareerSection.OfferViewURL}</td>
<td></td>
</tr>
<tr>
<td>EOffer Response Notification</td>
<td>Standard notification for recruiters when candidates acted on electronic offers (accept /</td>
<td>Configuration &gt; [Recruiting] Message Templates</td>
</tr>
<tr>
<td></td>
<td>refuse). The message gets sent as soon as the candidate responds.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>By default, the candidate response notification only goes to the recruiter assigned to the</td>
<td></td>
</tr>
<tr>
<td></td>
<td>requisition.</td>
<td></td>
</tr>
</tbody>
</table>
When changing an existing company logo, the logo is updated everywhere, including past offer letters. In an offer letter, the logo is saved as a link to the logo. As a result, changing the logo will also update the logo in past offer letters. A workaround would be to upload a new logo using another Custom Correspondence Logo setting instead of changing an existing logo setting.

**Offer Statuses**

An offer can go through different statuses.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offer to be made</td>
<td>Initial status of the Offer step.</td>
</tr>
<tr>
<td>Draft</td>
<td>Offer terms have been started and saved, but not approved. If offer approvals are not required, the offer may be extended at this point.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>A draft offer has been created and then cancelled prior to routing for approval or extending to the candidate.</td>
</tr>
<tr>
<td>Approval in progress</td>
<td>Offer has been routed for approval.</td>
</tr>
<tr>
<td>Approval rejected</td>
<td>Offer approval request has been rejected.</td>
</tr>
<tr>
<td>Approved</td>
<td>Offer approval request has been approved and the offer is ready to be extended to the candidate.</td>
</tr>
<tr>
<td>Extended</td>
<td>Offer has been extended to the candidate.</td>
</tr>
<tr>
<td>Rescinded</td>
<td>After the offer has been extended or the candidate has accepted the offer, the user (company) rescinds/revokes the offer.</td>
</tr>
<tr>
<td>In negotiation</td>
<td>Offer was extended to the candidate. The user marked the candidate as wanting to negotiate the offer. If a new offer should be created, the user will need to rescind the offer in order to create a new offer. If a new offer is not required, then either recapture the candidate response (accept or refused) or status them as Rejected or Has Declined.</td>
</tr>
<tr>
<td>Refused</td>
<td>Offer was extended to the candidate. The user or the candidate marked the candidate as refusing the offer. A new offer can be created at this point.</td>
</tr>
<tr>
<td>Accepted</td>
<td>Offer was accepted by the candidate.</td>
</tr>
<tr>
<td>Reneged</td>
<td>After the candidate has accepted the offer, the candidate refuses the offer (goes back on his or her word).</td>
</tr>
<tr>
<td>Rejected</td>
<td>After the offer has been rescinded to a candidate, if the user does not wish to create and extend a different offer to the same candidate, the user should status the candidate as</td>
</tr>
<tr>
<td>Status</td>
<td>Description</td>
</tr>
<tr>
<td>--------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Rejected</td>
<td>Rejected in the Offer step. This will allow an offer to another candidate be created and extended.</td>
</tr>
<tr>
<td>Has declined</td>
<td>After the offer has been refused or reneged by the candidate, if the user does not wish to create and extend a different offer to the same candidate, the user should status the candidate as Has Declined in the Offer step. This will allow another offer to be created and extended.</td>
</tr>
</tbody>
</table>
Hourly Hiring

Hourly Manager Home Page and Center Stage

The Taleo solution supports managers doing self-service hiring and managers working in a decentralized environment. This includes options to use one or more simple home page configurations for various populations of users.

Home pages are configured via the SmartOrg Configuration Profiles feature. A pre-defined Hourly Manager configuration profile is provided with the application and this profile references a pre-defined Hourly Manager center stage. Both provides a reasonable set of default settings which customers can use as a starting point and modify to meet their needs.

The configuration of the Hourly Manager home page consists of the following:

- configuring the Hourly Manager center stage.
- associating the Hourly Manager center stage to the Hourly Manager configuration profile.
- associating the Hourly Manager configuration profile to user accounts.
- configuring the mini requisition list.

Center Stage: The default Hourly Manager center stage uses a channel called the Mini Requisition List. By default, the Hourly Manager center stage also contains the Onboarding channel and a link to the Performance Management Suite (both of which only appear if these modules are deployed and available to the user). The Center Stage feature is available in the Recruiting Administration menu. For details, see the Center Stage chapter.

Configuration Profile: Once the center stage is created, the system administrator must associate it to a configuration profile. The system administrator can use the pre-defined Hourly Manager configuration profile. By default, the Hourly Manager center stage is tied to the Hourly Manager configuration profile. If desired, the system administrator can create a new configuration profile. The configuration and creation of configuration profiles are done in the SmartOrg Configuration Profiles feature. For details, see the Configuration Profile chapter.

User Account: To quickly and easily give users to hourly related capabilities, the system administrator only needs to update the user account by associated it to the Hourly Manager configuration profile. This is done in the SmartOrg User Accounts feature, under the Account Information section.

Mini Requisition (or Job Openings) List: This is a center stage widget option created specifically to help support distributed hourly hiring deployments. This list lets users click directly from the center stage channel into a requisition's candidate list without having to first load the Requisition list page. This mini requisition list can contain up to four columns of summary information about each requisition, including the number of candidates. It can also display up to 30 requisitions (the ones with the most recent submission activity).

The system administrator configures the mini requisition list (if used) via the List Formats feature available in the Recruiting Administration menu. See List Format Configuration for more details. The mini requisition list is called “Job Openings” to better support continuous hiring scenarios, however this name can be edited by Taleo.

Note that the mini requisition list honors the permissions set by the Show filter (e.g., Show Requisitions I Own, I Collaborate On, etc.), if it is made visible on the home page. However, a typical hourly manager configuration is to define user permissions by Personal Coverage Area (for details, see the Personal Coverage Area chapter). This is done via the configuration profile feature by selecting the My coverage area value in the Show Information For Filter Default setting and by hiding this filter from the user via the Show information for Filter Visibility setting. This will make the user's permissions simple and automatic if you can define them in terms of Organizations, Locations and Job Fields.
**Hourly Manager User Type**

A default user type configuration has been created to support hourly manager's need for a more simplified user experience.

Although system administrators can create their own personalized user types, the hourly manager user type is designed to help managers in hourly hiring deployments. The Hourly Manager user type is intended to reflect the combination of permissions that will provide a reasonable starting point for customers to use for their managers involved in self-service, continuous and/or high volume hiring scenarios.

<table>
<thead>
<tr>
<th>Hourly Manager User Type - Permissions Granted</th>
<th>Permissions Not granted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access to hourly requisitions</td>
<td>Edit candidate information</td>
</tr>
<tr>
<td>Access to requisitions that the user owns, is a collaborator on, or are in the user’s Personal Coverage Area</td>
<td>Access Professional, Campus, Contingent or Executive requisition</td>
</tr>
<tr>
<td>Post requisitions to career sections</td>
<td>Access job boards, staffing agents, internet mining</td>
</tr>
<tr>
<td>Access prescreening information</td>
<td>Perform advanced search and save searches</td>
</tr>
<tr>
<td>Add comments to submissions</td>
<td></td>
</tr>
<tr>
<td>Unlock candidate accounts, reset password</td>
<td></td>
</tr>
<tr>
<td>Customize correspondence before sending</td>
<td></td>
</tr>
</tbody>
</table>

The default Hourly Manager user type may be used as is or an organization may decide to modify the permissions and rename the user type name to meet their organization needs. System administrators should review and modify all default permissions to meet their company's specific needs.

**Fifth Level of Location**

A fifth level of location can be added to the location structure to support more granular location specification requirements of some customers.

System administrators have the option to update their SmartOrg location structure and add up to 5 levels in this structure. Once the structure is updated, it will be possible to create location elements across all activated levels in the location structure.

This accommodates customers who want to capture more specific location information within their Location tree, especially organizations with thousands of locations in different countries. The location structure could be defined as follows:

- Country
- State/Province
- Metro/Region
- City/District
- Store/Location

With individual worksites part of the Location tree, even for large decentralized operations, locations can be assigned down to the work site level. Customers will also be able to use the lowest level in their structure as work locations. Also, data access can be controlled down to the Location level using either the User Group and/or the Personal Coverage Area feature.
Evergreen Hiring

Evergreen hiring is used in continuous hiring situations such as retail stores where employers want to enable candidates to apply at all times, and also want a ready supply of candidates available to move quickly when a need is identified.

Often such employers will want to implement a definite validity period and expiration for the candidate's submission, with the easy ability for the candidate to re-apply after his/her submission expires. It is not uncommon for workers in the hourly retail world to have held several different jobs within the span of a year. Employers need to ensure they are collecting all of the most recent information regarding a candidate's relevant history. This may also help to limit legal exposures in addition to confirming candidate's continued interest in employment with the employer.

A submission validity period may be enabled for any requisition, before that requisition reaches the Sourcing status. The number of days for the validity period is inherited from a default setting (initially 90 days), but may be changed for specific requisitions by users with sufficient permissions. The Validity Period and Validity Period Enabled fields may also be inherited from a requisition template. The submission validity period must be between 1 and 730 days (2 years).

The validity period starts when a candidate submits his/her completed submission. The candidate submission remains valid for the number of days defined in the requisition. For submissions created when matching or referring a candidate, the period starts on the date that the candidate was matched or referred. If a submission is incomplete and the candidate later completes it, the validity period is restarted.

The Evergreen Hiring feature basically works as follows:

For the Evergreen Hiring feature to be available, the system administrator must make the following two requisition fields available in the Recruiting application:

- Validity Period Enabled
- Validity Period

If desired, the security level can be set for those fields to hide them from some users. Once these fields are activated, the system administrator can add them to the requisition and/or requisition template, in the Identification block. It is necessary to have the Validity Period Enabled field in either the requisition template and/or the requisition file in order to enable submission expiration.

If the expiration for all requisitions is the same (following the default setting), consider to either not display the Validity Period field in the requisition file, or to set the field to read-only. If different validity periods are needed for different jobs, consider adding the Validity Period field in the requisition template where authorized users can set it, but not in the requisition file itself.

In the Recruiting application, when creating a requisition or requisition template, users can use the default validity period set by the system administrator or set a different validity period for the requisition or requisition template being created. The validity period must be set before the requisition is posted. The submission validity period is displayed in the requisition card (located on the left hand side of the requisition), when hovering the mouse over the icon.

Once the requisition is posted, candidates applying on the requisition will be informed of the expiration date of their submission on the Thank You page. Within the Recruiting Center, the submission validity period is displayed in the candidate submission card, when hovering the mouse over the icon.

If the candidate's submission has expired and the requisition is still posted, the Modify link is replaced with the Reapply link on the candidate's My Jobs page. When candidates re-apply for a job:
- The submission’s validity period and expiration date are reset.
- A summary of the candidate's current information will be displayed to allow him/her to make any necessary changes.
- Depending on how the zone was configured, the candidate selection workflow of the submission may be reset back to the beginning.
- A tracking history is automatically added in candidate file History tab. If during the reapply process, the system forces the candidate selection workflow to be reset, a second tracking history is added in the History tab stating that.

Once candidates have applied on the requisition, the column in the Requisitions list indicating the candidate count considers if the submission validity period is enabled or not for the requisition. If the validity period is enabled, the count only includes candidate submissions that are not expired.

The system administrator also has the ability to add the following columns in the candidate lists and requisition lists. When these columns are made available in list formats, users can select them to display the desired information:

<table>
<thead>
<tr>
<th>Candidate List Columns</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submission Expired</td>
<td>This column is represented by the <img src="image" alt="icon" /> icon. When a submission is expired, the <img src="image" alt="icon" /> icon is displayed.</td>
</tr>
<tr>
<td>Latest Submission Date</td>
<td>Date when the candidate has submitted his/her submission or has reapplied.</td>
</tr>
<tr>
<td>Submission Expiration Date</td>
<td>Date when the candidate submission expires/expired.</td>
</tr>
<tr>
<td>Days before Submission Expiration</td>
<td>Displays as a countdown the number of days left before the expiration of the submission.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Requisition List Columns</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submission Validity Period Enabled</td>
<td>This column is represented by the <img src="image" alt="icon" /> icon.</td>
</tr>
<tr>
<td>Submission Validity Period</td>
<td>Number of days of the validity period.</td>
</tr>
</tbody>
</table>

The *Hide expired submissions* quick filter can be added to Candidates list to let users show or hide expired candidate submissions. Expired submissions are hidden by default. This filter is only available for requisition-specific candidate list formats.

The system administrator can also enable a setting to determine under which conditions the Candidate Selection Workflow (CSW) is reset to the initial step/status after a candidate re-applies for the same requisition (after submission expiration). Note that the CSW will never change if the submission has reached the Offer step or if an interview has been scheduled.

### Configuration

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default Submission Validity Period</td>
<td>When enabling the submission validity period on a newly created requisition, the default number of days before a submission shall</td>
<td>90</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
</tbody>
</table>
### Setting Up the Evergreen Hiring Feature

**Prerequisite**

**Configuration > [Recruiting] Administration**

**Steps**

1. Under Recruiting Settings, set the validity period of the Default Submission Validity Period setting.
2. Under Fields/Requisition:
   a) Make the Validity Period Enabled field available to be used in Taleo Recruiting. Note that the Validity Period field is automatically enabled when the Validity Period Enabled field is activated.
   b) You can set the security level of the Validity Period Enabled and Validity Period fields.
3. Under User-defined Forms, add the Validity Period, Validity Period Enabled, and Number of Openings fields in the Identification user-defined form.
4. Under User-defined Files, add the Identification user-defined form to a requisition template or requisition file.
5. Under Requisition File Setup, associate the requisition file and/or requisition template to a specific purpose.
6. Under User-defined Files, you can select a Prescreening Hourly file and add the Submission Validity Period block.
7. Under Candidate File Setup, associate the candidate file to a specific purpose.
8. Under List Formats, you can add the following columns to a candidate list format:
   - Submission Expired
   - Latest Submission Date
   - Submission Expiration Date
   - Days before Submission Expiration
9. Under List Formats, you can add the following quick filter to a candidate list format:
   - Show unexpired submissions
10. Under List Formats, you can add the following columns to a requisition list format:
    - Submission Validity Period Enabled
    - Submission Validity Period

---

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reset Candidate Selection</td>
<td>Reset the candidate selection workflow to the 1st step/status after a candidate re-applies for the same requisition (after submission expiration). By default the candidate's status remains the same. The CSW will not change if the submission has reached the &quot;Offer&quot; step or if an interview has been scheduled.</td>
<td>If the submission has reached the status Hired, Inactive or Withdrawn</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Workflow after Candidate Re-</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>applies</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
11. Under Recruiting Settings, enable the *Reset Candidate Selection Workflow after Candidate Re-applies* setting.

This setting allows users to determine whether the CSW is reset to the 1st step/status after a candidate re-applies for the same requisition (after submission expiration). By default the candidate's status remains the same. The CSW will not change if the submission has reached the *Offer* step or if an interview has been scheduled.
Questions and Competencies

Questions and Competencies - Permissions and Settings

The following permissions and settings are used to configure questions, disqualification questions, and competencies.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access the question and competency libraries</td>
<td>Gives Recruiting Center users access to the Questions, Disqualification Questions, and Competencies libraries.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Prescreening and Electronic Feedback</td>
</tr>
<tr>
<td>Associate questions and competencies with structure elements</td>
<td>Gives Recruiting Center users the ability to associate questions and competencies to Locations and/or Job Fields.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Prescreening and Electronic Feedback</td>
</tr>
<tr>
<td>Manage disqualification questions</td>
<td>Allows Recruiting Center users to use disqualification questions.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Prescreening and Electronic Feedback</td>
</tr>
<tr>
<td>Remove or delete questions and competencies</td>
<td></td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Prescreening and Electronic Feedback</td>
</tr>
<tr>
<td>Edit questions and competencies</td>
<td>Gives Recruiting Center users the ability to modify questions and competencies in the Libraries.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Prescreening and Electronic Feedback</td>
</tr>
<tr>
<td>Add and remove competencies</td>
<td></td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Prescreening and Electronic Feedback</td>
</tr>
<tr>
<td>Create questions</td>
<td></td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Prescreening and Electronic Feedback</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Differentiate Internal and</td>
<td>When creating requisitions, differentiate prescreening for internal and</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>External Candidates in Prescreening Forms</td>
<td>external candidates. Recruiting Center users will use</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>the distinction between internal and external candidates. Recruiting Center users will use</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Setting</td>
<td>Description</td>
<td>Default Value</td>
<td>Location</td>
</tr>
<tr>
<td>---------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------</td>
<td>-------------------------------------</td>
</tr>
<tr>
<td>see drop-down menus on the requisition</td>
<td>Prescreening tab.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Differentiate Internal and</td>
<td>Allows the questions and skills visibility for candidates to be set.</td>
<td>No</td>
<td>Configuration &gt; [Recruiting]</td>
</tr>
<tr>
<td>External Questions</td>
<td>If you use profilers, this setting allows you to create different profiler</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>questions for internal and external candidates.</td>
<td></td>
<td>Settings</td>
</tr>
<tr>
<td>Enable Disqualification Questions</td>
<td>Enables candidate disqualification questions.</td>
<td>No</td>
<td>Configuration &gt; [Recruiting]</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Settings</td>
</tr>
<tr>
<td>Explanation in Disqualification Questions</td>
<td>Enables an explanation for disqualification question specific answers.</td>
<td>Yes</td>
<td>Configuration &gt; [Recruiting]</td>
</tr>
<tr>
<td></td>
<td>Candidates are then required to provide explanations for specific</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>answers. This feature provides candidates a greater opportunity to</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>accurately explain their qualifications and it also reduces the need</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>for users to make follow-up contact with candidates to obtain details</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>regarding their responses.</td>
<td></td>
<td>Settings</td>
</tr>
<tr>
<td>Skill Assessment Format</td>
<td>System administrators can define if competency proficiency levels can be</td>
<td>Detailed</td>
<td>Configuration &gt; [Recruiting]</td>
</tr>
<tr>
<td></td>
<td>selected by users when creating a requisition. Three configurations are</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>available:</td>
<td></td>
<td>Settings</td>
</tr>
<tr>
<td></td>
<td>• Detailed: When this option is selected, Recruiting Center users can</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>select the minimum proficiency level of a competency as well as the</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>minimum years of experience required when they create a requisition.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Simple: When this option is selected, Recruiting Center users cannot</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>select the minimum proficiency level of a competency when they create</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>a requisition.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Detailed or Simple: When this option is selected, Recruiting Center</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>users must select the option &quot;Modify the minimum requirements of</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>proficiency and experience&quot; before being able to select a</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Setting</td>
<td>Description</td>
<td>Default Value</td>
<td>Location</td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------</td>
<td>-----------------------------------</td>
</tr>
<tr>
<td>Skill Experience Level</td>
<td>Indicates the baseline for the years of experience. This setting is set globally for the entire organization. Possible values are:</td>
<td>1-3 years</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
</tbody>
</table>
|                                     | • Less than 1 year  
|                                     | • 1-3 years  
|                                     | • 3-5 years  
|                                     | • 5 years or +                                                                                                                                   |               |                                   |
| Skill Proficiency Level             | Expresses proficiency collected via simple skills format in terms of the selected minimum level. It indicates the baseline for proficiency level. This setting is set globally for the entire organization. Possible values are: | Intermediate  | Configuration > [Recruiting] Settings |
|                                     | • Novice  
|                                     | • Intermediate  
|                                     | • Expert  
|                                     | • Guru                                                                                                                                       |               |                                   |
| Competency Selector Default View in Requisition | Activates this view by default in the competency selector. It determines from which library users will select competencies. Possible values are:                                                                 | Organization Competencies | Configuration > [Recruiting] Settings |
|                                     | • Organization Competencies (competencies resulting from the mapping of your company job fields to the Taleo job fields so that the competencies list contains competencies that are considered relevant for your company).  
|                                     | • Taleo Competencies (the complete Taleo competencies library, classified according to generic job fields).  
<p>|                                     | • Competency Library (competencies selected by your company among the Taleo competencies library. These competencies are classified according to the |               |                                   |</p>
<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>location and job fields of your company).</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Competency Assessment Definitions

### Proficiency Level

<table>
<thead>
<tr>
<th>Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>Candidates have no experience or training regarding the competency.</td>
</tr>
<tr>
<td>Beginner</td>
<td>Candidates have received basic training and can perform the competency with some assistance. They received classroom or field training, either as an apprentice or through an internship.</td>
</tr>
<tr>
<td>Intermediate</td>
<td>Candidates have completed at least one successful experience. Help from an expert may be required occasionally, but candidates can usually perform the competency themselves.</td>
</tr>
<tr>
<td>Advanced</td>
<td>Candidates can perform the competency without any assistance. They are recognized within their company as “the people to ask” regarding the competency. They might be known in the industry as a specialist. They have extensive experience and could teach the subject if they had teaching competencies.</td>
</tr>
<tr>
<td>Expert</td>
<td>Candidates can answer all questions about the competency and industry-related questions. They have contributed to developing, defining, or improving the competency. They have published a paper on the subject and advanced people actively seek their advice. They are often offered jobs.</td>
</tr>
</tbody>
</table>

### Experience Level

<table>
<thead>
<tr>
<th>Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>Candidates have no experience or training regarding the competency.</td>
</tr>
<tr>
<td>Less than 1 year</td>
<td>Candidates possess between 1 and 11 months of work experience during which they had to perform the competency.</td>
</tr>
<tr>
<td>1 to 3 years</td>
<td>Candidates possess between 12 and 35 months of work experience during which they had to perform the competency.</td>
</tr>
<tr>
<td>3 to 5 years</td>
<td>Candidates possess between 36 and 59 months of work experience during which they had to perform the competency.</td>
</tr>
<tr>
<td>5 years +</td>
<td>Candidates possess 60 months or more of work experience during which they had to perform the competency.</td>
</tr>
</tbody>
</table>

### Last Used Level

<table>
<thead>
<tr>
<th>Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>Candidates have never performed the competency.</td>
</tr>
<tr>
<td>Current</td>
<td>Candidates perform the competency as part of their current employment.</td>
</tr>
<tr>
<td>Last Year</td>
<td>Candidates successfully performed the competency within the last 11 months.</td>
</tr>
<tr>
<td>Last Used Level</td>
<td></td>
</tr>
<tr>
<td>-----------------</td>
<td></td>
</tr>
<tr>
<td>1 to 3 years ago</td>
<td>Candidates successfully performed the competency between 12 and 35 months ago.</td>
</tr>
<tr>
<td>3 to 5 years ago</td>
<td>Candidates successfully performed the competency between 36 and 59 months ago.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Interest Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
</tr>
<tr>
<td>Low</td>
</tr>
<tr>
<td>Medium</td>
</tr>
<tr>
<td>High</td>
</tr>
</tbody>
</table>

**Competency Assessment**

A competency is used to gather proficiency level and years of experience of a candidate in order to find the best candidate for a job.

There are two ways to display competency assessment:

- Simple Competency Assessment: Allows candidates to assess their competencies by selecting—using check boxes—the competencies for which they possess a certain level of proficiency and experience.
- Detailed Competency Assessment: Allows candidates to assess their competencies by selecting—from lists or radio buttons—the appropriate level of experience, proficiency, last used, and interest. The process is repeated for each competency.

The format available to candidates depends on a setting enabled by system administrators. Your organization can choose to display both or just one form of competency assessment to candidates. This determination can be made for each different career section your organization maintains.

If using the Simple Competency Assessment display, a minimum baseline needs to be established for the entire organization. This baseline defines the minimum levels of proficiency and experience needed for a candidate to "have" a competency. In career sections, a statement is displayed to candidates explaining what constitutes "having a competency" in terms of your global baseline - there's only a single check box to mark if they "have" that competency.

If using the Detailed Competency Assessment display, candidates are asked to select their proficiency, experience, when the competency was last used, and their interest level in that competency. Explanations of the different choices are displayed to candidates in the career section.
Partner Competencies

Taleo has the ability to partner with competency providers and offer a wide range of competency solutions to Taleo customers.

When a third party competency library has been associated with the system, it can be enabled by Oracle Support in the Configuration section. Once enabled, system administrators can configure individual competencies within the library to be displayed or hidden.

The complete feature is described in the Taleo Performance Guide. Below is a summary of this feature in Recruiting.

- Partner competencies can be activated by Oracle Support if bought by a customer.
- Partner competencies appear in the Competencies section under the Global Configuration menu.
- It is possible to rename Taleo standard competencies. If a competency is renamed, it is carried through not only in Taleo Performance but also in Taleo Recruiting.
- When a partner’s competencies are activated for a specific customer, these competencies are visible in Taleo Recruiting. In Taleo Performance, these competencies have more details and content like sub-competencies; in Taleo Recruiting, a small set of new behavioral competencies are available.
Reports

Report

A wide range of custom and standard reports are available via Taleo Reporting and Analytics solution.

If your company has acquired the Taleo Reporting and Analytics solution, users will be able to access a wide range of reports by selecting “Reporting and Analytics” in the Recruiting Table of Content page. For more details on the Taleo reporting solution, refer to the Reporting and Analytics User Guide.

Custom fields can be added to reports. In the Recruiting Administration menu, the system administrator can create custom fields and tag them to appear in reports.

Configuration

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Reports</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Other &gt; General</td>
</tr>
</tbody>
</table>

Custom Report Universe

The Custom Report Universe feature displays custom fields available for reports and allows the system administrator to specify an ID for each field in the reports.

The Custom Report Universe page only displays custom fields that have been tagged to appear in reports. Fields are organized into categories that is Requisition, Department, Offer, Candidate, Experience, Education.

The Custom Report Universe page also allows system administrators to specify an ID for each field (left hand side red rectangle). The ID will then appear in reports (right hand side red rectangle). Although the text appearing in the image is in English, IDs are displayed at the same location in all languages.
A maximum of 50 custom fields can be included in a report.

### Organizing Custom Fields in Reports

**Prerequisite**

*Configuration > [Recruiting] Administration > Custom Report Universe*

**Steps**

1. In the Custom Report Universe page, under each tab, select the position of the field by selecting a number in the BO ID list.
2. Click Reorder.

**Result**

In the report, fields will be displayed in the specified order.

### Configuring a Custom Field for Reports

**Prerequisite**

*Configuration > [Recruiting] Administration > Fields*

**Steps**

1. In the Recruiting Administration menu, click on field category.
2. In the fields page, click Show Custom Fields.
3. Click on a custom field.
4. Click Edit Field Availability next to Properties.
5. Click Save.

**Result**

The custom field appears in the Custom Report Universe page and can be used in reports to collect information specific to a company’s requirement.

**Next Step**

Specify the order in which custom fields will appear in reports.
Tasks

Task

A task is an action a user needs to perform regarding a requisition, a candidate file, or an offer. Tasks are generated by the system and displayed in the Tasks channel (home page) and in the Tasks list.

Tasks Channel

The Tasks channel may display tasks related to requisitions, candidates, offers, Onboarding, Transitions and self-assigned tasks. Clicking an hyperlink in the Tasks channel gives access to the Tasks list where users can see all tasks in one list view and use quick filters to filter the list. For details regarding elements in the Tasks channel, see Center Stage (Home Page).

Tasks List

The Tasks list presents task information in different columns and provides quick filters. Columns and quick filters are not configurable.

In the Tasks list, a task can only be executed by the owner of the task or his/her delegate. A task that can be executed is underlined and clickable. All system-generated tasks show the due date as "blank" and the priority as "normal". These fields are present to support any candidate self-assigned tasks which do have due dates and priority set.

In the Tasks list, when selecting the "I own" filter, tasks related to requisitions the user owns (as a user and user assistant) are displayed. If a system-generated task is assigned to the user, both the user and user’s assistant will be able to perform the task. If a system-generated task is assigned to the user assistant, both the user assistant and user will be able to perform the task. In both cases the task will be displayed as a link.

Available Tasks

Tasks are related to requisition files, candidates files, and offers.

<table>
<thead>
<tr>
<th>Tasks Related to Requisitions</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>To be completed</td>
<td>Reminds the user that a requisition still has to be completed before it can be posted. The task is generated at the creation of a requisition. The task is assigned to the recruiter assistant. If there is none, it is assigned to the recruiter.</td>
</tr>
<tr>
<td>Approve requisition</td>
<td>Reminds the user to approve a requisition.</td>
</tr>
<tr>
<td>Ready for sourcing</td>
<td>Reminds the user that a requisition is ready to be posted. The Ready for sourcing task is generated once the requisition is Approved and the completion level is Ready for sourcing. If the requisition is approved by the Save As Open action, the Ready for sourcing task is assigned to the recruiter assistant. If there is none, it is assigned to the recruiter. If the requisition is approved by the Request Approval action, the Ready for sourcing task will be assigned to the user specified in the After Approval section of the Request Approval window.</td>
</tr>
</tbody>
</table>
### Tasks Related to Requisitions

<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amend Approval Path</td>
</tr>
<tr>
<td>Reminds the user to perform the <em>Amend Approval Path</em> action for a requisition. The Amend Approval Path task is generated when another user has performed the action Request Approval Path Amendment and selected the user as the assignee.</td>
</tr>
<tr>
<td>Sourcing strategy to be defined</td>
</tr>
<tr>
<td>Reminds the user that the Posting and Sourcing must be defined for a specific requisition.</td>
</tr>
<tr>
<td>Contribute</td>
</tr>
<tr>
<td>The Contribute task is the result of the Request Contribution action assigned to the contributor. It reminds the user that a contribution is required for a specific requisition.</td>
</tr>
<tr>
<td>To be filled</td>
</tr>
<tr>
<td>Reminds the user that a requisition has to be manually filled because it was not automatically filled for some reasons.</td>
</tr>
<tr>
<td>Complete Selection Process</td>
</tr>
<tr>
<td>Reminds the user to complete the selection process. The task appears when something is preventing the hire process. The task is assigned to the recruiter assistant. If there is none, it is assigned to the recruiter.</td>
</tr>
<tr>
<td>Extend posting</td>
</tr>
<tr>
<td>Reminds the user to extend the posting of a requisition.</td>
</tr>
</tbody>
</table>

### Tasks Related to Candidate Files

<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finalize Start Date</td>
</tr>
<tr>
<td>Reminds the user to set as final the start date for the offers accepted with a tentative start date.</td>
</tr>
<tr>
<td>Duplicate Check</td>
</tr>
<tr>
<td>When a candidate applies on a career section and a duplicate check is not performed immediately, a Duplicate Check task is generated. The task is assigned to the recruiter assistant. If there is none, it is assigned to the recruiter. See <em>Duplicate Check</em>.</td>
</tr>
<tr>
<td>Self-Assigned Task</td>
</tr>
<tr>
<td>A self-assigned task is a task a user creates for himself. See <em>Self-Assigned Task</em>.</td>
</tr>
</tbody>
</table>

### Tasks Related to Offers

<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extend Offer</td>
</tr>
<tr>
<td>Reminds the user to <em>extend an offer</em>.</td>
</tr>
<tr>
<td>Approve Offer</td>
</tr>
<tr>
<td>Reminds the user to <em>approve an offer</em>.</td>
</tr>
<tr>
<td>Confirm Employee Presence</td>
</tr>
<tr>
<td>Reminds the user to set as Hired candidates who have accepted an offer with a non-tentative start date. The task is assigned to the recruiter assistant. If there is none, it is assigned to the recruiter. See <em>Confirm Employee Presence</em>.</td>
</tr>
</tbody>
</table>

### Rules Regarding Task Assignment

Tasks are assigned to a user or to the user’s assistant according to these rules:

- When a system-generated task is created, the assignee is always the “user’s assistant” (if a user assistant is identified). Otherwise, the assignee is always the user. However, the user also has access to these tasks even though they were assigned to the assistant.
- Both the user and the user’s assistant can access the linked task regardless to whom (user or assistant) the task was assigned to.
- If a user assistant is identified after a system-generated task was created, the task will remain assigned to the user, but the linked task will be available to both the user and user’s assistant.
• If a user assistant was assigned a task and the user assistant was later removed, the task will automatically be re-assigned to the user.

**Columns in the Tasks List**

The Tasks list presents task information in different columns.

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attention indicator flag</td>
<td>Draws the user's attention to items that he/she owns and that require viewing.</td>
</tr>
<tr>
<td>Tasks</td>
<td>Link that brings the user to the activity to be completed. A callout containing the task type, the assignment date and the owner is displayed when hovering the mouse on the task.</td>
</tr>
<tr>
<td>Candidate</td>
<td>Link to the associated candidate file. A callout containing phone numbers and email address is displayed when hovering the mouse on the candidate.</td>
</tr>
<tr>
<td>Requisition</td>
<td>Link to the associated requisition file. A callout with requisition ID, activated languages and features is displayed when hovering the mouse on the requisition.</td>
</tr>
<tr>
<td>Assignee</td>
<td>Person who will perform the task.</td>
</tr>
<tr>
<td>Comments</td>
<td>Callout displaying the comment.</td>
</tr>
<tr>
<td>Due date</td>
<td>Only relevant for self-assigned tasks.</td>
</tr>
<tr>
<td>Priority</td>
<td>Only relevant for self-assigned tasks.</td>
</tr>
<tr>
<td>Status</td>
<td>Status of the task.</td>
</tr>
</tbody>
</table>

**Quick Filters in the Tasks List**

The Tasks list provides quick filters to quickly filter the list down to relevant information.

<table>
<thead>
<tr>
<th>Quick Filter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show tasks for</td>
<td>Details on the &quot;Assigned to me&quot; filter are available below.</td>
</tr>
<tr>
<td>Requiring attention</td>
<td>Displays tasks that have an Attention Indicator Flag. Self-assigned tasks are the only type of tasks that do not have an Attention Indicator Flag because it is always the assignee who creates the task.</td>
</tr>
<tr>
<td>Hide completed tasks</td>
<td>Removes tasks that have the Completed status.</td>
</tr>
<tr>
<td>Due date</td>
<td>Displays tasks for which the due date matches the selected value (All, Next Week, Today, Overdue). When the option &quot;Exclude task without due date&quot; is selected, tasks without a due date will not appear in the list.</td>
</tr>
<tr>
<td>Task type</td>
<td>Displays the type of task selected. If no task type is specified, all task types appear in the list.</td>
</tr>
<tr>
<td>Related to Candidate</td>
<td>Displays tasks related to the selected candidate.</td>
</tr>
</tbody>
</table>
### Quick Filter

<table>
<thead>
<tr>
<th>Quick Filter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Related to Requisition</td>
<td>Displays tasks related to the selected requisition.</td>
</tr>
<tr>
<td>Related to Assignee</td>
<td>Displays tasks related to the selected user.</td>
</tr>
</tbody>
</table>

"Assigned to me" filter

The "Assigned to me" filter was created to eliminate the confusion of mixing tasks that users own with tasks that users might not own, but are for requisitions they own. The filter is available in the Tasks channel and in the Tasks list. In the Tasks channel, the "Tasks assigned to me" link is available to quickly access tasks assigned to the user. In the Tasks list, the filter "Assigned to me" is available via the "Show tasks for" list. The value "Assigned to me" is the default value when accessing the Tasks list.

When a Self-assigned Task link is clicked in the Tasks channel, users are brought to the Tasks list; the "Assigned to me" value is selected in the "Show tasks for" filter no matter what the "Show information for" filter on the My Taleo page is set to.

When any of other task link is clicked (for example, under Requisition, Candidate, Offer), users are brought to the Tasks list; the value in the "Show tasks for" filter is identical to the value selected in the "Show information for" filter of the My Taleo page. Example: If "I own" is selected in the "Show information for" filter on the My Taleo page, then "Requisitions I own" is selected in the "Show tasks for" filter in the Tasks list. If a group is selected in the "Show information for" filter on the My Taleo page, then the same group is selected in the Tasks list.

If users have the ability to see and change the "Show information for" filter setting, once in the Tasks list they can change it to what they wish to see. If they don’t have access to this filter, then they will need to navigate back to the Tasks channel and click on the task they want to see in order to have the Tasks list filtered for them.

The Show information for Default Value setting that can be set in a configuration profile has no effect on the Tasks list view and the Tasks channel view.

### Duplicate Check Task

The Duplicate Check task in the Recruiting Center Tasks list can be performed on any potential duplicates found within flows where the duplicate check action is activated, that is agency, referrer, or candidate flows.

When this feature is enabled, if a potential duplicate is found by the system, a Duplicate Check task is sent to the requisition’s owner, that is the recruiter assistant. If no recruiter assistant was defined, it is sent to the recruiter. For a duplicate check task performed in a profile context, if a potential duplicate is found, since there is no recruiter the task is redirected to the person defined in a setting configured by the system administrator.

The task assignee runs the Duplicate Check task. Duplicates are displayed in a Quick Search Results list. The task assignee can then merge the duplicate files.

The Duplicate Check Task uses the advanced search indexing, which may create a small delay.

### Configuring the Duplicate Check Task

The configuration of the duplicate check task is done in the Recruiting Administration menu as well as in the Career Section Administration menu.

The duplicate check task configuration involves the following steps:
• When configuring a career section application flow, select the *Activate the identification of potentially duplicate candidates* option in the Personal Information block.

• Specify the person who will perform the duplicate check task in the Recruiting Center for candidate general profiles.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Profile Duplicate Check Task Assignee</td>
<td>Indicates the person responsible for the duplicate check task among the candidate general profiles.</td>
<td></td>
<td>Configuration &gt; [Career Sections] Settings</td>
</tr>
</tbody>
</table>

**Self-assigned Task**

A self-assigned task is a task a Recruiting Center user creates for himself.

Recruiting Center users can select a candidate file, create a self-assigned task to act on at a later time, and activate a reminder to ensure the task is completed on time. The self-assigned task feature is also available while changing the step of a candidate.

For example, let say that you want to call the candidate John Doyle by the end of the week to invite him for an interview the following Monday. You need to open John Doyle candidate file, create a self-assigned task (for example “Confirm Monday’s Interview”) and set a reminder for Friday. On Friday morning, you will receive an email message reminding you to call John to see if he is available for an interview the following Monday. The email message contains a link that you can click in order to access all the information regarding this task. Then, in your list of tasks, click on the task regarding John Doyle to obtain details regarding this task as well as information regarding the candidate and the requisition he applied to. Look at John’s phone number in his candidate file and can call him to invite him for the interview. When the task is completed (i.e., you phoned John), you simply need to indicate that the task is completed by selecting the Completed status. The Confirm Monday’s Interview task is no longer displayed in the Tasks list.

A self-assigned task can also be created for several candidate files. For example, you could have a pre-filtered lists of candidates that are to be phone screened and create a single self-assigned task to perform an initial phone screen. The system automatically creates a separate self-assigned task for each candidate that was selected.

Self-assigned tasks can only be viewed by their creator. They cannot be redirected to delegates or transferred to a new user taking over.

Reminders are sent daily and users receive them in the morning (according to the appropriate time zone).

Self-assigned tasks are not reportable; reports showing self-assigned tasks cannot be created.

**Granting the Permission to Create Self-Assigned Tasks**

**Steps**

Grant the *Manage my self-assigned tasks* user type permission in the SmartOrg User Types feature.
Result
The Create Self Assigned Task action in available to users in the More Actions list allowing users to create tasks for themselves.

Confirm Employee Presence Task
The Confirm Employee Presence task is used to remind users to set as Hired candidates who have accepted an offer with a non-tentative start date.

The Confirm Employee Presence task is assigned to the recruiter assistant. If there is none, the task is assigned to the recruiter.

The Confirm Employee Presence task is displayed once the offer start date has been reached.

When a user confirms the employee presence at work, the following options may be displayed:

- **Yes, the employee is present**: Confirms the employee presence at work. If the Automatic Hire feature is enabled, the candidate is automatically hired.
- **Yes, the employee is present - Complete the selection process now**: Confirms the employee presence at work. In the Change Step and Status window, if the current status is a completion status, the Move action is offered. Otherwise, the Change Status is offered.
- **No, the candidate could not be present. I want to specify a new Start Date**: The Update Start Date window is displayed and the user can enter a new start date.
- **No, the candidate has reneged the offer**: The Renage Offer window is displayed and the user must enter a comment indicating why the candidate changed his mind and decided to refuse the offer.

The system administrator has the ability to send a reminder to users so they confirm the employee presence at work before the start date of a new hire. This is done by configuring the setting Confirm Employee Presence Reminder and putting a value between 1 and 7 days.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Confirm Employee Presence Reminder</td>
<td>Remind user to confirm employee presence X days before the start date of a new hire.</td>
<td>No Reminder</td>
<td>Configuration &gt; [Recruiting] &gt; Settings</td>
</tr>
</tbody>
</table>
General Features

Attachments

Files can be attached to requisitions and candidate files.

The following file formats are supported by the system. System administrators define which formats are available to users.

- Any File Format
- Excel (.xls and .xlsx)
- Hypertext Markup Language (.htm and .html)
- OpenOffice Writer (.odt)
- Portal Document Format (.pdf)
- Rich Text Format (.rtf)
- Text (.txt)
- Word (.doc and .docx)
- Word Perfect (.wpd)
- Zip Format

When attaching a file to a requisition, the attachment appears in the requisition file Attachments tab. The attachment can be shared with approvers and users having access to the requisition.

When attaching a file to a candidate file (general profile or job submission), Recruiting Center users can indicate if the attachment will be visible to the candidate. They can also indicate if the attachment is a candidate resume. The Resume column in the Attachments tab allows users to view which attachments are resumes. Once a file is tagged as being a resume, users can remove the Resume tag by clicking the Edit button in the Attachments section and selecting No. Note that files attached through the resume parsing feature are automatically marked as being resumes.

Recruiting Center users can view candidate attachments of type .docx or .odt directly from a browser without having to download and open the file with a native application. In the candidate file Attachments tab, when users click an attachment of type .docx and .odt files, the attachment is converted into HTML and can be viewed directly from a browser. HTML conversion for these other document types is still supported:

- Excel (.xls and .xlsx)
- Hypertext Markup Language (.htm and .html)
- OpenOffice Writer (.odt)
- Portal Document Format (.pdf)
- Rich Text Format (.rtf)
- Text (.txt)
- Word (.doc and .docx)

Attachment - Permissions and Settings

The following permissions and settings are used to configure the attachment functionality.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attachment Formats Filter</td>
<td>File formats allowed for the attachments. This setting is used</td>
<td>Any File Format</td>
<td>Configuration &gt; [General Configuration] Settings</td>
</tr>
<tr>
<td>Setting</td>
<td>Description</td>
<td>Default Value</td>
<td>Location</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>--------------------------</td>
<td>-----------------------------------</td>
</tr>
<tr>
<td>Attached File Maximum Number</td>
<td>Indicates the maximum number of file attachments allowed per entity record.</td>
<td>10 files</td>
<td>Configuration &gt; [General Configuration] Settings</td>
</tr>
<tr>
<td>Attached File Maximum Size</td>
<td>Indicates the maximum size of a file attachment (in bytes) allowed.</td>
<td>1048576 bytes (1 MB)</td>
<td>Configuration &gt; [General Configuration] Settings</td>
</tr>
<tr>
<td>Block Macros in Attachments</td>
<td>The system will scan the attachments for macros. Files including macros will not be uploaded.</td>
<td>Yes</td>
<td>Configuration &gt; [General Configuration] Settings</td>
</tr>
<tr>
<td>Share Other Attachments</td>
<td>When enabled, users will be able to include &quot;other attachments&quot; in &quot;Candidate Share&quot; or &quot;Interview Request&quot; actions. &quot;Other attachments&quot; in this case equates to any attachment not directly related to job submission/general profile from which the action is being taken.</td>
<td>Yes</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
</tbody>
</table>

for the entire Taleo Enterprise suite.

- Any File Format
- Excel (.xls and .xlsx)
- Hypertext Markup Language (.htm and .html)
- OpenOffice Writer (.odt)
- Portal Document Format (.pdf)
- Rich Text Format (.rtf)
- Text (.txt)
- Word (.doc and .docx)
- Word Perfect (.wpd)
- Zip Format
<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidate maximum attachment updates</td>
<td>Maximum number of possible candidate attachment updates per period. This is</td>
<td>5</td>
<td>Configuration &gt; [Career Sections] Settings</td>
</tr>
<tr>
<td></td>
<td>a protected setting activated by Oracle Support.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maximum attempts to attach file period</td>
<td>Period during which the maximum number of candidate attachment attempts apply.</td>
<td>30</td>
<td>Configuration &gt; [Career Sections] Settings</td>
</tr>
<tr>
<td></td>
<td>This is a protected setting activated by Oracle Support.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attachments searched by Candidate Keyword Search</td>
<td>Determines the list of attachments searched by the Candidate Advanced Search with keywords. Possible values are:</td>
<td>All Candidate Visible</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td></td>
<td>• All Attachments</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• All Candidate Visible</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• All Resumes</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>When &quot;All Resumes&quot; is selected, the system will only search attachments tagged as resumes.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Important Information Regarding Attachment Size and Number of Attachments**

The allocated number of attached files, the attached file size limit, and the attached file formats are controlled with one set of settings for the entire Taleo Enterprise suite. This means that the same rules apply for attachments to candidate files, requisitions, offers, submissions, Onboarding and Transitions PDFs, etc.

Since version 13A, new packaging limits are available for attachments:

- For customers with Oracle Taleo Platform Cloud Service (Basic package offering), the attached file maximum size is 1 MB per file, and the maximum number of attached files is of 10 files per entity.
- For customers with Oracle Taleo Premium File Attachments Limits Cloud Service (Premium package offering), the attached file maximum size is 5 MB per file, and the maximum number of attached files is of 25 files per entity.

Any combination of attachment size multiplied by the number of attachments is allowed as long as it does not exceed 5 MB per file or the package offering options. For example, for the Basic package offering, if the attached file maximum size is 1 MB per file and the maximum number of attached files is of 10 files per entity, the following possibilities would be allowed.

<table>
<thead>
<tr>
<th>Attachment Size</th>
<th>Number of Attachments</th>
<th>Total</th>
<th>Allowed</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 MB</td>
<td>5</td>
<td>10 MB</td>
<td>Yes</td>
</tr>
<tr>
<td>5 MB</td>
<td>2</td>
<td>10 MB</td>
<td>Yes</td>
</tr>
<tr>
<td>5 MB</td>
<td>5</td>
<td>25 MB</td>
<td>No. Exceeds the 10 MB limit.</td>
</tr>
</tbody>
</table>
To change the attachment limit values, customers must enter a service request. An Oracle Support representative will validate the request and make sure the combination of attachment size multiplied by the number of attachments does not exceed the package offering option.

For the Attached File Maximum Number setting, a maximum number of attachments is allowed per entity record. Candidate-facing attachments are counted together across all general profiles and job submissions. Recruiter-facing attachments are counted together across all general profiles, but separately per job submission. For example, if the setting is set to 10 attachments, attachments will be counted as follows:

- **Offer attachments:** they are counted per offer, so 10 attachments would be allowed per offer.
- **Candidate-facing attachments:** these are files attached by the candidate, or attached by the recruiter and flagged as "Visible by candidate". A total of 10 attachments would be allowed for all general profiles and job submissions of a given candidate.
- **Recruiter-facing attachments:** these are files attached by the recruiter and not flagged as "Visible by candidate". A total of 10 attachments would be allowed for all general profiles of a given candidate (a candidate can have more than one general profile, one per language for example). Ten additional attachments would be allowed for each job submission.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Attachments tab</td>
<td>Attachment visibility in lists reflects the use of the <strong>View other attachments</strong> and <strong>Access Attachments tab</strong> permissions. <em>See below for details.</em></td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Candidates</td>
</tr>
<tr>
<td>View other attachments</td>
<td>Attachment visibility in lists reflects the use of the <strong>View other attachments</strong> and <strong>Access Attachments tab</strong> permissions. <em>See below for details.</em></td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Candidates</td>
</tr>
<tr>
<td>Remove files attached by other users</td>
<td>To safeguard against users inadvertently removing files attached by other users or candidates, the <strong>Remove files attached by other users</strong> permission was created. This permission defines the rights users have to remove files that they did not themselves directly attach to the candidate file. When this permission is not granted, users are only able to remove files they have uploaded themselves.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Candidates</td>
</tr>
<tr>
<td>Attach a file (general).</td>
<td></td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Candidates &gt; General</td>
</tr>
<tr>
<td>Attach a file (on preselected candidates).</td>
<td></td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Candidates &gt; General</td>
</tr>
</tbody>
</table>

Attachment visibility in lists reflects the use of the **View other attachments** and **Access Attachments tab** permissions:
• The Attachments column (represented by this icon 📄) is always present if configured in the list format, regardless of a user’s permissions.
• The Attachments icon (📄) appears if a user has the Access Attachments tab permission.
• The Attachments icon appears in the search results list and folders list if a user has the View other attachments permission.
• The Attachments icon callout displays only candidate facing attachments. The display of attachments respects a user's viewing permissions. If a user has the View Attachments tab permission, but not the View other attachments permission, attachments that exist may be hidden; the callout will display "Restricted Visibility" if files attached to the candidate file are classified as "other attachments" and the user is not authorized to view them.

Print Function

The print functionality allows Recruiting Center users to create a PDF version of a requisition file or candidate file that can be printed. The Print functionality allows Recruiting Center users to create a PDF version of a candidate file that can be printed. Users can select one or several candidate files and the system is generating a single PDF including the candidate data for all the selected candidates and sections. In version 13C, the following enhancements were done to the Print functionality:

The print function 📄 is available in the candidates list and requisitions list as well as within candidate files and requisition files. When using the print function, users can decide to print the content in a list format where information is presented in different columns, or they can choose to print the details of the file where content is presented into sections.

• When printing the content in a list format, the content of the file is presented in different columns and the content of each file is displayed in a row. The format of the list (that is, the columns used to display the information) is identical to the requisition or candidate list format used. A maximum of 1000 lines can be printed in the list.
• When printing the details of the file, all sections of the file or only specific sections can be printed. For example, a user can choose to print from a candidate file only prescreening and basic profile information. Sections selected by a user when using the print function are saved as defaults for the next print action, but blocks selected within the main submission file section are not. Also, sections available to a user are based on how the file is configured and on user permissions. This means, if a system administrator wanted to allow users to more precisely control what is printed, he/she can do this by increasing the sections in the file layout. For candidate files, a maximum of 50 files can be printed. For requisition files, a maximum of 15 files can be printed.

When printing candidate files:

• Attachment content is included within the generated PDF, along with the candidate information. When clicking the Print icon 📄, users can select the type of attachments they wish to include in the generated PDF. These attachments are part of the generated PDF, along with the candidate information. Three options are available: Most recent flagged resume, Visible by candidate (Excludes flagged resume), Not visible by candidate (Excludes flagged resume).
• A Table of Contents is available in the generated PDF so that users can easily navigate through the candidate files. Clicking the Bookmarks icon in the PDF will display the Table of Contents.
• Print candidate actions are tracked in the candidate file History tab.

When using the print functionality, only fields containing data are visible in the view/print mode; this means fields with no data will not be rendered when printing. The PDF generated by the print function is identical to the data presented to the user for the selected sections while looking at the information in view mode.
When selecting one or several candidate files in a candidates list or requisition-specific candidate list in order to print them, the Submission file is printed. When selecting one or several candidate general profiles in a search results list or folders list, the General Profile file is printed.

Regarding tracking information in the candidate file History tab, the system displays the 1000 most recent tracking items no matter if printing 1 or 50 candidate files. Therefore, if printing one candidate file, the 1000 most recent tracking items are displayed. If printing five candidate files for example, 200 tracking items are displayed per candidate. For a given candidate, when the maximum is reached, the following message is displayed: "The history contains the {0} most recent items".

When printing a candidate file, it is not possible while printing to include the name of candidate facing attached files. Attachments appear in the Attachments tab; they are not part of the candidate file and they are not printed with the file.

Print Function - Settings

The following setting is used to configure the print functionality.

A setting allows system administrators to select which sections of the candidate job submission or general profile users will be able to print. Two values are available:

- All sections can be selected
- Only the Job Submission/General Profile section and the Attachments section can be selected

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Configuration of Sections in the Job Submission/General Profile for the Print and Share Functionalities</td>
<td>Enables the ability to configure the sections in the candidate general profile and job submission, including attachments, that can be printed or shared. This setting applies to all users who have the permissions to use the print or share functionality.</td>
<td>All sections can be selected</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
</tbody>
</table>

Folder

In the Recruiting Center, folders are used for organizing candidate files and search queries.

Recruiting Center users who have been granted the proper permissions have the ability to organize folders in ways that best suit their needs. They can store candidate files as well as candidate search queries in folders. They can create, delete, and rename folders and they can also share folders with other users.

The Folder tab is available in the left panel of the Candidates list and Search Queries list.
Folder - Permissions

The following permissions are used to configure the folder functionality.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use personal folders</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Candidates</td>
</tr>
<tr>
<td>Share personal folders</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Other</td>
</tr>
<tr>
<td>Access shared folders</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Other</td>
</tr>
</tbody>
</table>

Time Zone

Time zones are used throughout the system where a date or time is required.

In the Recruiting Center, dates and time are presented in a manner that takes into account the user’s time zone thereby making dates easier to understand and freeing users from the task of converting the dates themselves.

System administrators can set the default time zone for an entire company. Users who are in the same time zone as the company do not need to modify their time zone. However, users who are not located in the same time zone as their company will need to modify their time zone to view information in their own time zone (for interview scheduling, for example). Time zone changes can be done by users via the My Setup feature if they were granted the permission by their system administrator.

As a best practice, users should set their time zone under My Setup if they want to have the correct time displayed.

An example where time zone is used is for scheduling interviews with candidates. When scheduling an interview, the time zone of the person scheduling the meeting is used as a reference value. This means that the time of the meeting in the Recruiting Center is displayed according to the time zone selected by the person who scheduled the meeting, but the time of the meeting in Outlook or Lotus Notes is displayed according to the time zone set in the recipients’ Windows settings. For example, a user living in San Francisco schedules an interview from 2 p.m. to 3 p.m. Pacific Time. For an attendee living in New-York, the time of the meeting in Taleo Recruiting is from 2 p.m. to 3 p.m. Pacific Time, but the time of the meeting in Outlook is from 5 p.m. to 6 p.m. Eastern Time.

Another example where time zone is used is for requisition posting. When posting requisitions, the time zone taken into account is the time zone of the user doing the posting (and not where the requisition is posted).

Daylight Savings Time

The same calculation is used during the daylight savings period across the Recruiting Center.

Daylight savings time is properly calculated for dates handled across the Recruiting Center. Many dates are time zone sensitive and as such are converted.
Algorithm to Calculate the Time Zone

To determine a user’s time zone, the algorithm is as follows:

- The system uses the time zone selected in the user’s preferences (defined by the user under Recruiting Center > Resources > My Setup > Preferences > Time Zone and by the system administrator under Configuration > [SmartOrg] Administration > User Accounts > select a user account > General Preferences > Time Zone).
- If the above was not defined, the system uses the default user’s preferences time zone (Configuration > General Configuration > Settings > Time Zone).
- If the above was not defined (unlikely), the system uses the user’s operating system UTC offset.
- If the above was not defined, the system uses the default time zone (Configuration > [Career Section] Settings).

Time Zones in Taleo Enterprise

<table>
<thead>
<tr>
<th>City</th>
<th>Time Zone Name</th>
<th>UTC Offset</th>
<th>Changes in 12C</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eniwetok, Kwajalein</td>
<td>Date Line Time</td>
<td>UTC -12:00</td>
<td></td>
</tr>
<tr>
<td>Midway Islands, Samoa</td>
<td>Samoa Time</td>
<td>UTC -11:00</td>
<td></td>
</tr>
<tr>
<td>Honolulu</td>
<td>Hawaii Time</td>
<td>UTC -10:00</td>
<td></td>
</tr>
<tr>
<td>Anchorage</td>
<td>Alaska Time</td>
<td>UTC -9:00</td>
<td></td>
</tr>
<tr>
<td>Tijuana</td>
<td>Mexico Pacific Time</td>
<td>UTC -8:00</td>
<td>Added the word Mexico to the time zone name to differentiate it from the Pacific Time name.</td>
</tr>
<tr>
<td>Vancouver, San Francisco, Los Angeles</td>
<td>Pacific Time</td>
<td>UTC -8:00</td>
<td></td>
</tr>
<tr>
<td>Chihuahua, La Paz, Mazatlan</td>
<td>Western Mexico Time</td>
<td>UTC -7:00</td>
<td></td>
</tr>
<tr>
<td>Edmonton, Denver, Boise, Salt Lake City</td>
<td>Mountain Time</td>
<td>UTC -7:00</td>
<td></td>
</tr>
<tr>
<td>Arizona, Hermosillo</td>
<td>Mountain US Time</td>
<td>UTC -7:00</td>
<td></td>
</tr>
<tr>
<td>Cancun, Mérida</td>
<td>Atlantic Mexico Time</td>
<td>UTC -6:00</td>
<td></td>
</tr>
<tr>
<td>Chicago, Winnipeg, Dallas</td>
<td>Central Time</td>
<td>UTC -6:00</td>
<td></td>
</tr>
<tr>
<td>San José, Managua</td>
<td>Central America Time</td>
<td>UTC -6:00</td>
<td></td>
</tr>
<tr>
<td>Regina (Saskatchewan)</td>
<td>Central Canada Time</td>
<td>UTC -6:00</td>
<td></td>
</tr>
<tr>
<td>Mexico City</td>
<td>Mexico General Time</td>
<td>UTC -6:00</td>
<td></td>
</tr>
<tr>
<td>Bogota, Lima, Quito, Panama City</td>
<td>Pacific South America Time</td>
<td>UTC -5:00</td>
<td></td>
</tr>
<tr>
<td>Montreal, New York, Washington D.C.</td>
<td>Eastern Time</td>
<td>UTC -5:00</td>
<td></td>
</tr>
<tr>
<td>Kingston, Georgetown</td>
<td>Jamaica Time</td>
<td>UTC -5:00</td>
<td></td>
</tr>
<tr>
<td>Caracas</td>
<td>Venezuela Time</td>
<td>UTC -4:30</td>
<td></td>
</tr>
<tr>
<td>City</td>
<td>Time Zone Name</td>
<td>UTC Offset</td>
<td>Changes in 12C</td>
</tr>
<tr>
<td>------------------------------</td>
<td>------------------------------</td>
<td>-------------</td>
<td>-----------------------------------------</td>
</tr>
<tr>
<td>Asunción</td>
<td>Paraguay Time</td>
<td>UTC -4:00</td>
<td></td>
</tr>
<tr>
<td>Cuiaba</td>
<td>Western Brazil Time</td>
<td>UTC -4:00</td>
<td></td>
</tr>
<tr>
<td>La Paz, San Juan</td>
<td>Western South America Time</td>
<td>UTC -4:00</td>
<td></td>
</tr>
<tr>
<td>Santiago</td>
<td>Chile Time</td>
<td>UTC -4:00</td>
<td></td>
</tr>
<tr>
<td>Halifax</td>
<td>Atlantic Time</td>
<td>UTC -4:00</td>
<td></td>
</tr>
<tr>
<td>St-John's (Newfoundland)</td>
<td>Newfoundland Time</td>
<td>UTC -3:30</td>
<td></td>
</tr>
<tr>
<td>Buenos Aires, Georgetown</td>
<td>Eastern South America Time</td>
<td>UTC -3:00</td>
<td></td>
</tr>
<tr>
<td>Greenland, Saint-Pierre and Miquelon</td>
<td>Greenland Time</td>
<td>UTC -3:00</td>
<td></td>
</tr>
<tr>
<td>Brasilia</td>
<td>Eastern Brazil Time</td>
<td>UTC -3:00</td>
<td></td>
</tr>
<tr>
<td>Mid Atlantic</td>
<td>Mid-Atlantic Time</td>
<td>UTC -2:00</td>
<td></td>
</tr>
<tr>
<td>Azores</td>
<td>Azores Time</td>
<td>UTC -1:00</td>
<td></td>
</tr>
<tr>
<td>Cap Verde Islands</td>
<td>Cape Verde Time</td>
<td>UTC -1:00</td>
<td></td>
</tr>
<tr>
<td>Dublin, Edinburgh, Lisbon, London</td>
<td>Greenwich Mean Time</td>
<td>UTC 0</td>
<td></td>
</tr>
<tr>
<td>Abidjan, Casablanca, Dakar</td>
<td>Greenwich Mean Time</td>
<td>UTC 0</td>
<td></td>
</tr>
<tr>
<td>Abuja, Alger, Kinshasa, Luanda, Niamey, Yaounde</td>
<td>Western Central Africa Time</td>
<td>UTC +1:00</td>
<td></td>
</tr>
<tr>
<td>Namibia</td>
<td>South Western Africa Time</td>
<td>UTC +1:00</td>
<td></td>
</tr>
<tr>
<td>Brussels, Copenhagen, Madrid, Paris</td>
<td>Central Europe Time</td>
<td>UTC +1:00</td>
<td></td>
</tr>
<tr>
<td>Sarajevo, Skopje, Vilnius, Warsaw, Zagreb</td>
<td>Central Europe Time</td>
<td>UTC +1:00</td>
<td></td>
</tr>
<tr>
<td>Belgrade, Bratislava, Budapest, Ljubljana, Prague</td>
<td>Central Europe Time</td>
<td>UTC +1:00</td>
<td></td>
</tr>
<tr>
<td>Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna</td>
<td>Central Europe Time</td>
<td>UTC +1:00</td>
<td></td>
</tr>
<tr>
<td>Cairo</td>
<td>Egypt Time</td>
<td>UTC +2:00</td>
<td></td>
</tr>
<tr>
<td>Harare, Pretoria</td>
<td>South Africa Time</td>
<td>UTC +2:00</td>
<td></td>
</tr>
<tr>
<td>Jordan</td>
<td>Jordan Time</td>
<td>UTC +2:00</td>
<td></td>
</tr>
<tr>
<td>Beirut</td>
<td>Lebanon Time</td>
<td>UTC +2:00</td>
<td></td>
</tr>
<tr>
<td>Damascus</td>
<td>Syria Time</td>
<td>UTC +2:00</td>
<td></td>
</tr>
<tr>
<td>Gaborone, Harare, Lilongwe, Lubumbashi, Lusaka, Maputo</td>
<td>Central Africa Time</td>
<td>UTC +2:00</td>
<td></td>
</tr>
<tr>
<td>Athens, Bucharest, Kiev</td>
<td>Eastern Europe Time</td>
<td>UTC +2:00</td>
<td>Removed the cities of Minsk and Sofia.</td>
</tr>
<tr>
<td>Helsinki, Riga, Tallinn, Sofia</td>
<td>Baltic States Time</td>
<td>UTC +2:00</td>
<td>Added the city of Sofia.</td>
</tr>
<tr>
<td>City</td>
<td>Time Zone Name</td>
<td>UTC Offset</td>
<td>Changes in 12C</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-------------------------------------</td>
<td>--------------</td>
<td>-------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Jerusalem</td>
<td>Israel Time</td>
<td>UTC +2:00</td>
<td></td>
</tr>
<tr>
<td>Baghdad</td>
<td>Iraq Time</td>
<td>UTC +3:00</td>
<td></td>
</tr>
<tr>
<td>Kuwait City, Riyadh</td>
<td>Arabian Peninsula Time</td>
<td>UTC +3:00</td>
<td></td>
</tr>
<tr>
<td>Nairobi</td>
<td>Eastern Africa Time</td>
<td>UTC +3:00</td>
<td></td>
</tr>
<tr>
<td>Tehran</td>
<td>Iran Time</td>
<td>UTC +3:30</td>
<td></td>
</tr>
<tr>
<td>Moscow, St. Petersburg, Volgograd</td>
<td>Russia Time</td>
<td>UTC+4:00</td>
<td>The cities of Moscow, St. Petersburg, and Volgograd no longer use daylight savings time.</td>
</tr>
<tr>
<td>Abu Dhabi, Muscat</td>
<td>South Eastern Arabian Peninsula Time</td>
<td>UTC +4:00</td>
<td></td>
</tr>
<tr>
<td>Baku, Tbilisi, Yerevan</td>
<td>Caucasus Time</td>
<td>UTC +4:00</td>
<td></td>
</tr>
<tr>
<td>Kabul</td>
<td>Afghanistan Time</td>
<td>UTC +4:30</td>
<td></td>
</tr>
<tr>
<td>Bishkek</td>
<td>Kyrgyzstan Time</td>
<td>UTC +5:00</td>
<td></td>
</tr>
<tr>
<td>Dushanbe, Islamabad, Karachi, Toshkent</td>
<td>West Asia Time</td>
<td>UTC +5:00</td>
<td></td>
</tr>
<tr>
<td>Calcutta, Chennai, Mumbai, New Delhi</td>
<td>India Time</td>
<td>UTC +5:30</td>
<td></td>
</tr>
<tr>
<td>Kathmandu</td>
<td>Nepal Time</td>
<td>UTC +5:45</td>
<td></td>
</tr>
<tr>
<td>Almaty, Astana</td>
<td>Kazakhstan Time</td>
<td>UTC +6:00</td>
<td></td>
</tr>
<tr>
<td>Dhaka</td>
<td>Central Asia Time</td>
<td>UTC +6:00</td>
<td></td>
</tr>
<tr>
<td>Novosibirsk</td>
<td>North Central Asia Time</td>
<td>UTC +6:00</td>
<td></td>
</tr>
<tr>
<td>Yangon</td>
<td>Myanmar Time</td>
<td>UTC +6:30</td>
<td></td>
</tr>
<tr>
<td>Krasnoyarsk</td>
<td>North Asia Standard Time</td>
<td>UTC +7:00</td>
<td></td>
</tr>
<tr>
<td>Bangkok, Hanoi, Jakarta</td>
<td>South Eastern Asia Time</td>
<td>UTC +7:00</td>
<td></td>
</tr>
<tr>
<td>Irkutsk, Ulaan Batar</td>
<td>North Eastern Asia Time</td>
<td>UTC +8:00</td>
<td></td>
</tr>
<tr>
<td>Perth</td>
<td>Western Australia Time</td>
<td>UTC +8:00</td>
<td></td>
</tr>
<tr>
<td>Beijing, Chongqing, Hong Kong, Urumqi</td>
<td>China Time</td>
<td>UTC +8:00</td>
<td></td>
</tr>
<tr>
<td>Singapore</td>
<td>Singapore Time</td>
<td>UTC +8:00</td>
<td></td>
</tr>
<tr>
<td>Yakutsk</td>
<td>Yakutsk Time</td>
<td>UTC +9:00</td>
<td></td>
</tr>
<tr>
<td>Osaka, Sapporo, Tokyo</td>
<td>Japan Time</td>
<td>UTC +9:00</td>
<td></td>
</tr>
<tr>
<td>Seoul</td>
<td>Korea Time</td>
<td>UTC +9:00</td>
<td></td>
</tr>
<tr>
<td>Adelaide</td>
<td>South Australia Time</td>
<td>UTC +9:30</td>
<td></td>
</tr>
<tr>
<td>Darwin</td>
<td>Australia Northern Territory Time</td>
<td>UTC +9:30</td>
<td></td>
</tr>
<tr>
<td>Canberra, Melbourne, Sydney</td>
<td>South Eastern Australia Time</td>
<td>UTC +10:00</td>
<td></td>
</tr>
<tr>
<td>Vladivostok</td>
<td>Vladivostok Time</td>
<td>UTC +10:00</td>
<td></td>
</tr>
<tr>
<td>City</td>
<td>Time Zone Name</td>
<td>UTC Offset</td>
<td>Changes in 12C</td>
</tr>
<tr>
<td>------------------------------------------</td>
<td>---------------------------------</td>
<td>------------</td>
<td>----------------</td>
</tr>
<tr>
<td>Brisbane</td>
<td>Queensland Time</td>
<td>UTC +10:00</td>
<td></td>
</tr>
<tr>
<td>Hobart</td>
<td>Tasmania Time</td>
<td>UTC +10:00</td>
<td></td>
</tr>
<tr>
<td>Port Moresby</td>
<td>Papua New Guinea Time</td>
<td>UTC +10:00</td>
<td></td>
</tr>
<tr>
<td>Lord Howe</td>
<td>Lord Howe Island Time</td>
<td>UTC +10:30</td>
<td></td>
</tr>
<tr>
<td>Magadan, Solomon Islands, New Caledonia</td>
<td>Central Pacific Time</td>
<td>UTC +11:00</td>
<td></td>
</tr>
<tr>
<td>Anadyr</td>
<td>Chukot Time</td>
<td>UTC +12:00</td>
<td></td>
</tr>
<tr>
<td>Auckland, Wellington</td>
<td>New Zealand Time</td>
<td>UTC +12:00</td>
<td></td>
</tr>
<tr>
<td>Fiji, Kamchatka, Marshall Islands</td>
<td>Fiji Time</td>
<td>UTC +12:00</td>
<td></td>
</tr>
<tr>
<td>Chatham Islands</td>
<td>Chatham Islands Time</td>
<td>UTC +12:45</td>
<td></td>
</tr>
<tr>
<td>Enderbury</td>
<td>Phoenix Islands Time</td>
<td>UTC +13:00</td>
<td></td>
</tr>
<tr>
<td>Nuku'alofa</td>
<td>Tonga Islands Time</td>
<td>UTC +13:00</td>
<td></td>
</tr>
<tr>
<td>Kiritimati</td>
<td>Line Islands Time</td>
<td>UTC +14:00</td>
<td></td>
</tr>
</tbody>
</table>

**Time Zone Sensitive Dates in the Recruiting Center**

<table>
<thead>
<tr>
<th>Requisition File - External Description Block - Opening Date</th>
<th>Requisition File - External Description Block - Closing Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisition File - Internal Description Block - Opening Date</td>
<td>Requisition File - Internal Description Block - Closing Date</td>
</tr>
<tr>
<td>Requisition File - History Tab - Event Dates</td>
<td>Requisition File - Posting &amp; Sourcing - Corporate Posting Dates</td>
</tr>
<tr>
<td>Requisition File - Posting &amp; Sourcing - eQuest Posting Date</td>
<td>Requisition File - Posting &amp; Sourcing - Staffing Agents</td>
</tr>
<tr>
<td>Requisition File - Posting &amp; Sourcing - Staffing Agency (Contingent)</td>
<td>Requisition File - Posting &amp; Sourcing - Source - Event List - Start Date (View &amp; Edit)</td>
</tr>
<tr>
<td>Requisition File - Posting &amp; Sourcing - Source - Event List - End Date (View &amp; Edit)</td>
<td>Events in the Candidate Source Tracking Block</td>
</tr>
<tr>
<td>Requisition List - Status Detail</td>
<td>Requisition List - Contacted Candidates (&quot;From&quot; in the Callout)</td>
</tr>
<tr>
<td>Requisition Template File - Effective From (Status)</td>
<td>Requisition Template File - Effective Till (Status)</td>
</tr>
<tr>
<td>Requisition Template List - Effective From</td>
<td>Requisition Template List - Effective Till</td>
</tr>
<tr>
<td>Prescreening Question File - Creation Date</td>
<td>Prescreening Question File - History - Event Date</td>
</tr>
<tr>
<td>Prescreening Competency File - History - Event Date</td>
<td>Prescreening Disqualification Question File - Creation Date</td>
</tr>
<tr>
<td>Prescreening Disqualification Question File - History - Event Date</td>
<td>Requisition Action - Share - Date in Printed PDF</td>
</tr>
<tr>
<td>Requisition Approval Task &amp; Eshare - Date in Requisition Detail PDF (must reflect the file)</td>
<td></td>
</tr>
<tr>
<td>Candidate Action - Schedule an Interview - Meeting Date</td>
<td>Candidate Action - Update an Interview - Meeting Date</td>
</tr>
<tr>
<td>Candidate Action - Cancel Interview - Meeting Date</td>
<td>Candidate File - Detail - Creation Date</td>
</tr>
<tr>
<td>---------------------------------------------------</td>
<td>----------------------------------------</td>
</tr>
<tr>
<td>Candidate File - Basic Profile - Date of Availability</td>
<td>Candidate File - Block Talent Exchange - Date</td>
</tr>
<tr>
<td>Candidate File - Attachments Tab - Submission-specific Attachments</td>
<td>Candidate File - Attachments Tab - Other Attachments</td>
</tr>
<tr>
<td>Candidate File - Self-Assigned Task List - Creation Date</td>
<td>Candidate File - History Tab - Event Dates</td>
</tr>
<tr>
<td>Candidate File - History Tab - Workflow Event Date</td>
<td>Candidate List - Quick Filters - Since (Effect on filtering)</td>
</tr>
<tr>
<td>Candidate List - Quick Filters - Last Activity Date (From &amp; To) (Effect on filtering)</td>
<td>Candidate List - Advanced Filters - Fields of Type Date</td>
</tr>
<tr>
<td>Candidate List - Standard Fields of Type Date</td>
<td>Candidate Advanced Search - Date Type criteria</td>
</tr>
<tr>
<td>Candidate Workflow Assistant - Workflow Event Date</td>
<td>Candidate Workflow Assistant - Self-Assigned Task - Due Date</td>
</tr>
<tr>
<td>Candidate Workflow Assistant - (Hire candidate) Start Date (with the setting &quot;Ignore Time Zone for Offer Start Date&quot; = NO)</td>
<td>Candidate Action - Print/Share - Date in Printed PDF</td>
</tr>
<tr>
<td>Task List - Due Date - Task List - Task Callout (Assignment Date)</td>
<td></td>
</tr>
<tr>
<td>Offer Grid - Expiration Date</td>
<td>Offer Grid - Created On</td>
</tr>
<tr>
<td>Offer Grid - Approved</td>
<td>Offer Grid - Extended</td>
</tr>
<tr>
<td>Offer Grid - Start Date (with the setting &quot;Ignore Time Zone for Offer Start Date&quot; = NO)</td>
<td>Offer Action - Update Expiration Date</td>
</tr>
<tr>
<td>Offer Action - Update Start Date (with the setting &quot;Ignore Time Zone for Offer Start Date&quot; = NO)</td>
<td>Offer Action - Extend Offer Verbally</td>
</tr>
<tr>
<td>Offer Action - Capture Response (Accepted) - Accepted On</td>
<td>Offer Action - Capture Response (Accepted) - Start Date (with the setting &quot;Ignore Time Zone for Offer Start Date&quot; = NO)</td>
</tr>
<tr>
<td>Offer Approval Tab - Decision Date &amp; Time</td>
<td>Candidate Selection Workflow - Update Start Date (No RSOffer) (with the setting &quot;Ignore Time Zone for Offer Start Date&quot; = NO)</td>
</tr>
<tr>
<td>Offer Approval Task &amp; eShare - Date in Offer detail PDF (must reflect the grid) (with the setting &quot;Ignore Time Zone for Offer Start Date&quot; = NO)</td>
<td>Offer Approval Task &amp; eShare - Date in Candidate Submission detail PDF (must reflect the file)</td>
</tr>
</tbody>
</table>

**Time Zone - Permissions and Settings**

The following permissions and settings are used to configure the time zone functionality.

<table>
<thead>
<tr>
<th>Setting or Preference</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time Zone</td>
<td>Indicates the preferred time zone.</td>
<td></td>
<td>Configuration &gt; [Central Configuration] &gt; Settings</td>
</tr>
<tr>
<td>Default Time Zone</td>
<td>Indicates the default time zone for Taleo products.</td>
<td></td>
<td>Configuration &gt; [Career Section] &gt; Settings</td>
</tr>
<tr>
<td>Setting or Preference</td>
<td>Description</td>
<td>Default Value</td>
<td>Location</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------</td>
<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Time Zone</td>
<td>This is the preferred time zone set by the system administrator for a user.</td>
<td></td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Accounts &gt; select a user account &gt; General Preferences</td>
</tr>
<tr>
<td>Time Zone</td>
<td>This is the preferred time zone set by the user.</td>
<td></td>
<td>Recruiting Center &gt; Resources &gt; My Setup &gt; Preferences</td>
</tr>
<tr>
<td>Ignore Time Zone for Offer Start Date</td>
<td>Ignore the time zone when using the offer start date. This is a Private setting. Contact Oracle Support for details.</td>
<td>No</td>
<td>Configuration &gt; [Recruiting] &gt; Settings</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access the &quot;Preferences&quot; section in 'My Set-up' menu</td>
<td>For users to have the ability to modify their time zone, the following permission is required. Once the permission is granted, users can modify their time zone in the My Setup feature, in the Preferences tab.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Other</td>
</tr>
</tbody>
</table>

**Using the Time Zone for the Offer Start Date**

By default, the time zone is used for the offer start date. A private setting controls this feature. If you do not wish to use the time zone for the offer start date, communicate with Oracle Support to have this setting modified.

**Languages**

Taleo Enterprise products are available in different optional languages.

Not all languages are available for all Taleo Enterprise products and languages must be activated by the system administrator before they can be used in an application.

There are several concepts around languages:

The **application language** is the language used for a product. This is the language selected by the user when signing in the Taleo Enterprise suite. The language selected defines the language of every UI labels and elements of the product.

The **content language** is the language of a specific entity. The content language is selected when creating an entity. For example, it is possible to create a requisition in French even when using the Recruiting Center in English. The content language of a user is set in the user’s account by the system administrator. However, a user can change this default content language under My Setup > Preferences. Note that the preferred content language is used by the system as the default content language which is the same across all Taleo Enterprise products. If a product does not support the same set of content languages, it will have its own preference configuration.

The **correspondence language** is the language used for email messages. The correspondence language of a user is set in the user’s account by the system administrator. However, a user can change this default correspondence language under My Setup > Preferences.

In Taleo Enterprise products, the languages in which an element (for example, a requisition) is available are indicated in the Languages field. When creating or editing an element, the user can choose a base language as
well as languages in which the element will be available. The base language of an element is the item’s reference language, usually used as a reference for other languages or fallback display in list mode. The user’s preferred content language is used as the default base language when the user creates an element. The base language of an element can be changed at any time by the user. A language must be activated before it can be designated as a base language.

When an element is available in one language, the name of the language is displayed; for example "en". When only one language is used within a company, there is no special indicator. When an element is available in several languages, the icon is displayed. Hovering the mouse over the icon displays the languages in which the element is available.

### Languages - Settings and Preferences

The following settings and preferences are used to configure languages.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Languages</td>
<td>List of application languages, presented according to the organization's preferences. The application language is the language in which a product can be viewed. This is a private setting. Contact Oracle Support for details.</td>
<td>French, English, German, Spanish</td>
<td>Configuration &gt; [General Configuration] Settings</td>
</tr>
<tr>
<td>Correspondence Language</td>
<td>Indicates the correspondence language.</td>
<td></td>
<td>Configuration &gt; [General Configuration] Settings</td>
</tr>
<tr>
<td>Content Language</td>
<td>Indicates the content language.</td>
<td></td>
<td>Configuration &gt; [General Configuration] Settings</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Preference</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Correspondence Language</td>
<td>Indicates the preferred correspondence language of a user.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Accounts &gt; General Preferences Recruiting Center &gt; Resources &gt; My Setup</td>
</tr>
<tr>
<td>Content Language</td>
<td>Indicates the preferred content language of a user.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Accounts &gt; General Preferences Recruiting Center &gt; Resources &gt; My Setup</td>
</tr>
</tbody>
</table>
Multilingual Deployment

Below are items worthy of note for multilingual deployments and system behavior.

**Requisition Search:** When using the search within a requisition, the system will always try to search using the user's Recruiting Center session language. If a requisition is not translated into the User's Recruiting Center session language, then the search criteria used will be empty and the results will have no bearing on the requisition used to conduct the search. To work past this, users should ensure that requisitions are translated into their application language if they are looking to use the "Search from this requisition" feature.

**Language Fallback:** Currently, there is no graceful fallback for the data presented to users when it is not available in their preferred language. This will impact customers with multilingual deployments where managers and candidate language preferences are not the same or jobs are created for managers but not in that manager's language preference (extreme edge case).

Here are two examples to illustrate this point as well as guidance on how to resolve it:

Scenario 1: Candidate data presented in PDF to share recipient during share function.

If a candidate applies in Japanese and the share sender's content language preference is English, the share file generated as well as all labels will be in English. Data for the submission file will be unilingual and will render for the user in English for selector fields and Japanese for text fields (this means things like resume text, cover letter text, work experience and education will come through fine). However, any profile based multilingual text and text area fields will not render for the user. This means for example that if the candidate has entered data into a candidate UDFs text field, it will not render to the share recipient if sent by an English content language share sender.

To work past this: If the share sender is sending a Japanese candidate submission and wants the data to be rendered in Japanese to the share recipient, he/she should change his/her content language preference under My Setup to Japanese prior to conducting the share action.

Scenario 2: Offer approval request for offer created in user's preferred correspondence language.

If an offer is created in English but a user’s access language for the file is French based on the defined rules, fields which are multilingual text and text area will be missing data when it is routed for approval to that user when conducting an approval via eShare. For example, compensation text fields would be impacted by this.

To work past this: Customers should ensure that the approver's preferred message content language or Recruiting Center logged in language matches the language in which the offer exists (depending on how the user is conducting his/her approval). Users can update their user preference or login using the right language if needed to view offer data and regenerate the PDF if there is a mismatch.

**Multilingual Requisition and Requisition Template Behavior**

Users can configure multiple languages on a requisition or requisition template.

When editing one of these files in a language other than the Recruiting Center language in use, all labels and drop-down menus will still appear in the language of the Recruiting Center, not the language of the file being edited. Prescreening and text based content will display in the edit view of the file in the language selected. In addition, users can use the language indicator on the left panel to know which language of the file they are working with. Edits can be made to drop-down menus in the file in any language; a value selected in one language will apply to all languages.
Multilingual Behavior with PDFs

To better understand the multilingual behavior of system-generated PDF files used for approvals and other system-generated candidate files and requisition files included in system-generated correspondence in the Recruiting Center, we are providing some clarification of what to expect from a language perspective.

If you are using Taleo in only one language, this section does not apply to your implementation and can be skipped.

PDF files are used throughout the Recruiting Center. The following table presents in which files PDFs are available and for which feature.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Requisition File</th>
<th>Candidate File</th>
<th>Offer File</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisition Approval</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Offer Approval</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Interview Request*</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>ACE Candidate Alert</td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Share Candidate</td>
<td></td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>

* Interview request file behavior is not outlined yet as it is still being researched.

The following table explains the type of data being translated in a PDF file as well as when a translation is available for each type of data.

<table>
<thead>
<tr>
<th>Container = Field labels and Section headers throughout the file.</th>
<th>When is it available?</th>
<th>When is it not available?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>If translated by a system administrator, or is a system field and has a system provided language.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Note: The candidate file container is always translated into all candidate facing languages. The requisition file container may not always be completely translated into all candidate facing languages because only career section exposed sections need to be translated into all available system languages.</td>
<td>If the field is a custom field that the system administrator has not translated.</td>
</tr>
<tr>
<td>Data = Information provided by an end user in the file.</td>
<td>If it was provided by an end user in that language.</td>
<td>If the end user has not provided a value in that language and the field is a multilingual text field (for example, most compensation fields are multilingual text fields).</td>
</tr>
</tbody>
</table>
When is it available? | When is it not available?
---|---
When the field used is unilingual and presented to the user in the same text regardless of language.

The following table indicates in which language the PDF content (container and data) is being translated.

<table>
<thead>
<tr>
<th>Container</th>
<th>Data</th>
</tr>
</thead>
</table>
| Requisition File  
• Requisition Approval  
• Offer Approval | From Tasks: The approver’s connected language.  
From eShare: The approver’s preferred message language, or if a login to eShare is required, the language specified upon entering the eShare Response Center.  
Same as container except there is a fallback if data is not translated into the user’s language.  
Fallback: Requisition base language. |
| Candidate File  
• ACE Candidate Alert  
• Share Candidate | If the recipient is a Recruiting Center user, the recipient’s preferred correspondence language is used; otherwise, the eShare sender’s content language is used.  
Candidate file submission language. |
| Candidate File  
• Offer Approval | From Tasks: The approver’s connected language.  
From eShare: The approver’s preferred message language, or if a login to eShare is required, the language specified upon entering the eShare Response Center.  
Candidate file submission language. |
| Offer File  
• Offer Approval | From Tasks: The approver’s connected language.  
From eShare: The approver’s preferred message language, or if a login to eShare is required, the language specified upon entering the eShare Response Center.  
Same as container. No fallback exists in this case. |

File recipients will receive files based on the situations outlined. File content will appear in the language(s) specified. When a language is not available in the language specified, the PDF will render but impacted container/data will be absent.

Here are two examples to illustrate this point as well as guidance on how to resolve it:

**Scenario 1: Candidate data presented in PDF to share recipient during share function.**

If a candidate applies in Japanese and the share sender’s content language preference is English, the share file generated as well as all labels will be in English. Data for the submission file will be unilingual and will render for the user in English for selector fields and Japanese for text fields (this means things like resume text, cover letter text, work experience and education will come through fine). However, any profile based multilingual text and text area fields will not render for the user. This means for example that if the candidate has entered data into
a candidate UDFs text field, it will not render to the share recipient if sent by an English content language share sender.

To work past this: If the share sender is sending a Japanese candidate submission and wants the data to be rendered in Japanese to the share recipient, he/she should change his/her content language preference under My Setup to Japanese prior to conducting the share action.

Scenario 2: Requisition approval request not translated into the user's specified content language.

If a requisition is created in English but a user's preferred content language is French, if the requisition has not been translated into French and is routed to that user for approval, fields which are multilingual text will be missing data when it is routed for approval to that user. For example, compensation text fields and job description fields would be impacted by this.

To work past this: Customers should ensure that requisitions are translated into all content languages used by approvers on a specific requisition. If a user does happen to receive a requisition approval request and some data does not come through because it was not translated into the user's content language, the user can log into the system and change his content preference to the appropriate language and then go to generate the requisition file again. This time, it will render in the updated language preference specified that contains all of the data.
Recruiting Center Layout Configuration

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- Other Page Layout Elements .......................................... 599
### General Layout

#### Home Page and User Interface Elements Configuration

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
<th>Configuration</th>
</tr>
</thead>
</table>
| Auxiliary Navigation Bar | The auxiliary navigation bar is the bar located at the top right of pages. If enabled, it is available at all times for users to see and access. The auxiliary navigation bar may contain the following elements (if enabled and if users were granted access to them):  
  - Home  
  - Resources (My Setup, Training, eLearning, Web Support, About)  
  - Talent Grid (Talent Exchange, Solution Exchange, Knowledge Exchange)  
  - Sign Out | The auxiliary navigation bar is displayed when the **Auxiliary Navigation Bar** setting is set to Yes (Configuration > [SmartOrg] Administration > [Users] Configuration Profiles). When set to No, the Home and Sign Out links are still displayed.  
Elements displayed in the auxiliary navigation bar depends on settings that were enabled and on permissions granted to users.  
The following permissions are required to access the Talent Grid products: **Access Knowledge Exchange, Access Solution Exchange, Access Talent Exchange** (Configuration > [SmartOrg] Administration > [Users] User Types > Grid > Knowledge Exchange). |}

| Core Navigation Bar      | The Recruiting Center core navigation bar provides access to specific recruiting features. The core navigation bar may contain the following elements (if enabled and if users were granted access to them):  
  - Recruiting  
  - Tasks  
  - Requisitions  
  - Candidates  
  - Offers  
  - Libraries (Templates, Questions, Disqualification Questions, Interview Questions, Competencies) | The core navigation bar is displayed when the **Core Navigation Bar** setting is set to Yes (Configuration > [SmartOrg] Administration > Configuration Profiles). When set to No, only the Recruiting tab is displayed. |}

| My Setup                 | The My Setup feature is available in the auxiliary navigation bar under Resources. It gives access to the user’s personal preferences. | The My Setup link is displayed to users if the **Auxiliary Navigation Bar** setting is set to Yes (Configuration > [SmartOrg] Administration > Configuration Profiles).  
To modify their preferences, users must be granted the following permissions:  
  - **Access the "Preferences" section in ‘My Setup’ menu** (Configuration > [SmartOrg] Administration > User Types > Recruiting > Other) |
<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
<th>Configuration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training</td>
<td>The Training link is available in the auxiliary navigation bar under Resources. It gives access to online training materials.</td>
<td>The Training link is displayed to users if the Training Section URL setting is set to Yes (Configuration &gt; [SmartOrg] Administration &gt; Configuration Profiles). The Auxiliary Navigation Bar setting must also be set to Yes (Configuration &gt; [SmartOrg] Administration &gt; Configuration Profiles).</td>
</tr>
<tr>
<td>eLearning</td>
<td>The eLearning link is available in the auxiliary navigation bar under Resources. It gives access to eLearning materials.</td>
<td>The eLearning link is displayed to users if the eLearning Section URL setting is set to Yes (Configuration &gt; [SmartOrg] Administration &gt; Configuration Profiles). The Auxiliary Navigation Bar setting must also be set to Yes (Configuration &gt; [SmartOrg] Administration &gt; Configuration Profiles).</td>
</tr>
<tr>
<td>About</td>
<td>The About link is available in the auxiliary navigation bar under Resources. It provides information regarding service pack, version, legal statement regarding IP protection.</td>
<td>The About link is displayed to users if the About Link in Auxiliary Menu setting is set to Yes (Configuration &gt; [SmartOrg] Administration &gt; Configuration Profiles). The Auxiliary Navigation Bar setting must also be set to Yes (Configuration &gt; [SmartOrg] Administration &gt; Configuration Profiles).</td>
</tr>
<tr>
<td>Web Support</td>
<td>The Web Support link is available in the auxiliary navigation bar under Resources. It gives access to Web Support. This link only works for users who are authorized Web Support users.</td>
<td>The Web Support link is displayed to users if the Display Web Support Link in Auxiliary menu setting is set to Yes (Configuration &gt; [SmartOrg] Administration &gt; Configuration Profiles). Furthermore, the Web Support feature must be activated by Oracle Support. If only the above setting is set to Yes, users will not have access to Web Support even though the link will still be present. The Auxiliary Navigation Bar setting must also be set to Yes (Configuration &gt; [SmartOrg] Administration &gt; Configuration Profiles).</td>
</tr>
</tbody>
</table>
| Talent Grid| The Talent Grid link is available in the auxiliary navigation bar. It gives direct access to the Solution Exchange, Knowledge Exchange and Talent Exchange. | The Auxiliary Navigation Bar setting must be set to Yes (Configuration > [SmartOrg] Administration > Configuration Profiles). The following permissions must be granted:  
  - Access Knowledge Exchange (Configuration > [SmartOrg] Administration > User Types > Grid > Knowledge Exchange)  
  - Access Solution Exchange (Configuration > [SmartOrg] Administration > User Types > Grid > Solution Exchange) |
<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
<th>Configuration</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Access Talent Exchange</strong> (Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Grid &gt; Talent Exchange)</td>
<td></td>
</tr>
<tr>
<td>Search Widget</td>
<td>This is the search tool allowing users to perform <em>quick candidate search, specific candidate search</em> and <em>quick requisition search</em>.</td>
<td>The search widget is displayed to users if the <strong>Search Widget</strong> setting is set to Yes (Configuration &gt; [SmartOrg] Administration &gt; Configuration Profiles).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The <strong>Access advanced search</strong> permission must be granted (Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Search).</td>
</tr>
<tr>
<td><strong>Advanced Search</strong></td>
<td>The Advanced Search link is available at the top right hand corner of pages, just beside the search widget. It allows users to search for candidate files using an array of criteria that are different than the ones used in the quick search function.</td>
<td>The search widget is displayed to users if the <strong>Advanced Search Links</strong> setting is set to Yes (Configuration &gt; [SmartOrg] Administration &gt; Configuration Profiles).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The <strong>Access advanced search</strong> permission must be granted (Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Search).</td>
</tr>
<tr>
<td>Search Queries</td>
<td>The Search Queries link is available at the top right hand corner of pages, just beside the search widget. A search query is an advanced candidate search that has been saved in order to be used repetitively and potentially shared with other users.</td>
<td>The search widget is displayed to users if the <strong>Advanced Search Links</strong> setting is set to Yes (Configuration &gt; [SmartOrg] Administration &gt; Configuration Profiles).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The <strong>Access advanced search</strong> permission must be granted (Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Search).</td>
</tr>
<tr>
<td>Center Stage</td>
<td>A center stage is what users see in the center panel when they first log into the Recruiting Center.</td>
<td>The center stage is configured via the Center Stage feature (Configuration &gt; [Recruiting] Administration &gt; Center Stage).</td>
</tr>
<tr>
<td>Page Header</td>
<td>A header text can be displayed at the top of all pages of the application.</td>
<td>The <strong>Recruiting Header Text</strong> setting allows the activation of the page header (Configuration &gt; [SmartOrg] Administration &gt; Configuration Profiles).</td>
</tr>
<tr>
<td>Page Footer</td>
<td>A footer text can be displayed on the home page of the application.</td>
<td>The <strong>Center Stage Footer Text</strong> setting allows the activation of the page footer (Configuration &gt; [SmartOrg] Administration &gt; Configuration Profiles).</td>
</tr>
<tr>
<td>Welcome Title</td>
<td>The welcome title is displayed to users when they first log in into the application.</td>
<td>The <strong>Center Stage-Welcome Title</strong> setting allows the activation of the welcome title (Configuration &gt; [SmartOrg] Administration &gt; Configuration Profiles).</td>
</tr>
<tr>
<td>Separator Line</td>
<td>The line separating the Welcome title from the main content of the center stage.</td>
<td>The <strong>Center Stage-Separator Line</strong> setting allows the activation of the separator line (Configuration &gt; [SmartOrg] Administration &gt; Configuration Profiles).</td>
</tr>
<tr>
<td><em>Communications Channel</em></td>
<td>The Communications channel is located in the tab located in the supporting tools panel on the right. The Communications channel allows the display of useful information to users when they first log into the Recruiting Center.</td>
<td>See <em>Communications Channel Configuration.</em></td>
</tr>
<tr>
<td>Element</td>
<td>Description</td>
<td>Configuration</td>
</tr>
<tr>
<td>--------------</td>
<td>-----------------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Color Theme</strong></td>
<td>A theme is a set of colors used for body text, headings, links within an application.</td>
<td>The theme color is selected using the <em>Default Theme</em> setting ([General Configuration] Settings). Users must be granted the <em>Access the &quot;Preferences&quot; section in 'My Setup' menu</em> permission to overwrite the theme you selected ([SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Other).</td>
</tr>
<tr>
<td><strong>Logo</strong></td>
<td>A logo can be displayed in the upper left corner of Taleo Recruiting and Taleo Performance pages.</td>
<td>The <em>Organization Logo</em> setting is used to upload a logo ([General Configuration] Settings).</td>
</tr>
<tr>
<td><strong>Selected Item Color</strong></td>
<td>This is the color displayed when selecting elements in the user interface.</td>
<td>The selected item color is selected using the <em>Selected Item Default Color</em> setting ([General Configuration] Settings). Users must be granted the <em>Access the &quot;Preferences&quot; section in 'My Setup' menu</em> permission to overwrite the theme you selected ([SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Other).</td>
</tr>
<tr>
<td><strong>Online Tour</strong></td>
<td>Short clips describing essential user interface elements. When enabled, these tours are available in the Clips tab, located in the supporting tools panel on the right.</td>
<td>The <em>Online Clips</em> setting controls what is displayed as online tours in the Recruiting Center. By default, Taleo standard online tours are displayed to users ([Recruiting] Settings). The <em>Online Clips - HTML Customized URL</em> setting is used to insert the URL for an organization customized online tours. For this setting to work, the <em>Online Clips</em> setting must be set to &quot;HTML Customized&quot; ([Recruiting] Settings). The <em>Taleo Recruiting Online Clips URL</em> setting is used to indicate the URL to access Taleo Recruiting online tours. For this setting to work, the <em>Online Clips</em> setting must be set to &quot;Taleo Standard (default)&quot;. This is a protected setting and only Taleo can modify it ([Recruiting] Settings).</td>
</tr>
</tbody>
</table>
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, Scheduling Center, Social Sourcing.
- Finally, Taleo customers 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.

Taleo Learn in the Welcome Center

Taleo Learn is a platform designed to enable organizations to deliver and track structured curriculum and learning events tied to compliance, regulatory, job role and onboarding requirements. Users can access Taleo Learn via the Welcome Center.

Users can access Taleo Learn directly from the Welcome Center core navigation bar or the Quick Access panel without logging into Taleo Learn. When users want to return to the Welcome Center, they can click Home on any Taleo Learn page.

Access to Learn is granted or rescinded via a user type permission in SmartOrg. Learn user types can be assigned to Taleo Enterprise users via user type permissions in SmartOrg. See Welcome Center - Settings and Permissions.

Prior to Feature Pack 11B, if a user had (Taleo Performance) development plan user permissions and the Learn and Development modules were enabled, the link to Taleo Learn was displayed. Now a specific Learn user permission must be associated with a user before the person can access the My Learn link.

Configuring the Welcome Center

The configuration of the Welcome Center consists of the following steps.

1. Contacting Oracle Support to enable the Display Welcome Center setting.
2. Creating the Welcome Center content which appears in the central panel.
3. Specifying which default content and layout to use in the Welcome Center.
4. Assigning the Welcome Center content to a configuration profile.
Enabling the Welcome Center

Prerequisite
Only Oracle Support can perform this task. The Manage settings and central configuration user type permission is required.

Configuration → [General Configuration] Settings

Steps
1. Locate and click Display Welcome Center.
2. Click Edit.
3. Make a selection by clicking the corresponding radio button.
4. Click Save.

Specifying the Default Welcome Center Content

Prerequisite
The Manage settings and central configuration user type permission is required.

Configuration → [General Configuration] Settings

Steps
1. Locate and click the Welcome Center Content setting.
2. Click Edit.
3. Click Search next to the Value field.
4. Click the radio button next to the item you want to designate as the default Welcome Center content page.
5. Click Select.
6. Click Save.

Result
The content page you selected is displayed to users who do not have one assigned to their configuration profile.

Creating the Welcome Center Content

Prerequisite
The Manage settings and central configuration user type permission is required.

Configuration → Welcome Center Content

Steps
1. Click Create.
2. Enter values in the various fields.
   In the Content box, you type or paste the text you want to display in the central panel of the Welcome Center.
   To apply a particular format to a word or passage, select the text with the mouse pointer and then click the icon of the corresponding format in the toolbar.
   You can add a static image to Welcome Center content by clicking in the Content toolbar.
3. Click Save.
4. To make the page available for selection, click Activate on the Welcome Center Content page.

Result
An item corresponding to the content page you created is displayed in the Welcome Center Content Pages list. You can create several content pages. You can then specify which one will be used by default.

Assigning Welcome Center Content to a Configuration Profile

Prerequisite
The following user type permissions are required: Manage settings and central configuration and Manage configuration profile.

Configuration > [SmartOrg] Administration > Configuration Profiles

Steps
1. Create a new configuration profile or click the code of an existing configuration profile in the Configuration Profiles list.
2. Click the Welcome Center Content link in the Configuration Profiles list.
3. Click Edit.
4. Click Search and select the radio button that corresponds to the content page you want to display to users who have been assigned the configuration profile.
5. Click Select.
6. Click Save.
7. Return to the Profile page and click Save to save your change.

Result
The system will show the Welcome Center content you selected to users who have this configuration profile whenever the Welcome Center is displayed.

Welcome Center - Settings and Permissions

The following settings and permissions are used for the Welcome Center functionality.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Welcome Center</td>
<td>Controls whether or not the &quot;Welcome Center&quot; is displayed. This is a private setting. Clients must contact Oracle Support if they wish to have the current value of the setting (unavailable to customers) changed to a different value. • If the setting is set to Yes and the user has access to multiple products, the Welcome Center is displayed. If the user has access to only one product, the landing page of the product is displayed rather than the Welcome Center page.</td>
<td>Yes</td>
<td>Configuration &gt; [General Configuration] Settings</td>
</tr>
<tr>
<td>Setting</td>
<td>Description</td>
<td>Default Value</td>
<td>Location</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------</td>
<td>------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Welcome Center Content</strong></td>
<td>Indicates which customized content and layout to use in the Welcome Center. The setting enables you to specify the content of the Welcome Center panel displayed by default i.e. displayed to users who do not have specific content assigned to their configuration profile. If the Display Welcome Center setting is enabled (by default or by Oracle Support) and you provide no information for the Welcome Center Content, the system displays information provided by Oracle Support.</td>
<td></td>
<td>Configuration &gt; [General Configuration] Settings</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Learn as a default user</td>
<td>This provides standard user access to Learn. This enables users to see LearnCenter pages and learning content. All sub permissions (in Learn) except View Course Offline are automatically selected. The user can also use the Com Center.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Learning &gt; Learn</td>
</tr>
<tr>
<td>Access Learn as a supervisor</td>
<td>This provides Learn supervisor access which typically provides manage access in Learn to users, user</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users]</td>
</tr>
<tr>
<td>User Type Permission</td>
<td>Description</td>
<td>Location</td>
</tr>
<tr>
<td>----------------------</td>
<td>-------------</td>
<td>----------</td>
</tr>
<tr>
<td>Access Learn as an administrator</td>
<td>communications, completion certificates, assignments, enrollments, development plans, goals, and reports.</td>
<td>User Types &gt; Learning &gt; Learn</td>
</tr>
<tr>
<td>Access Learn as user 1, user 2, user 3</td>
<td>This provides Learn administrator access, typically enabling users to manage LearnCenter configuration options and set up courses.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Learning &gt; Learn</td>
</tr>
<tr>
<td>Access Learn as user 1, user 2, user 3</td>
<td>These are custom user types, which must be aligned with custom user accounts in Taleo Learn by Taleo Customer Support.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Learning &gt; Learn</td>
</tr>
</tbody>
</table>
Center Stage

The center stage is what Recruiting Center users see in the center panel when they first log into the Recruiting Center.

From the center stage, users can be presented with key information and/or jump into the underlying application to perform more complex actions. For example, a center stage may contain elements such as a task list, links to create requisitions or view candidates, channels providing overview information on requisitions, candidates, or offers. A center stage can be customized for specific needs or users. Once the center stage is created and configured, it is associated to a user's configuration profile. Consequently, depending on the user logging into the Recruiting Center, the information displayed in the central panel of the home page will differ.

Three default center stages are supplied with the application:

- Recruiter
- Hiring Manager
- Hourly Manager
System administrators can edit these default center stages and can also create new center stages either from scratch or by duplicating existing ones. Changes made to a center stage are applied the next time a user linked to any configuration profiles using that center stage logs in.

Information in the center stage may be displayed as follows:

- Single column: Channels, links, and lists are displayed in one single column.
- Two columns: Channels, links, and lists are displayed in two columns. System administrators can choose which column and the order in which each widget will appear in that column.
- Two columns with header: Channels, links, and lists are displayed in either the header or one of the two columns, as specified by system administrators when placing the widgets.

A center stage may contain channels, links, and lists.

**Channels** includes a list of elements as well as the number of items associated to each element. The elements on the list are clickable and bring users to a more detailed area of the application, for example the candidate list, requisition list, etc. The elements on the list are also dependent on the value selected in the Show filter. Channels are supplied by Taleo and cannot be created nor edited. A channel can be expanded or collapsed. The following channels are available:

- Candidates
- New Hire
- Offers
- Onboarding
- Pre-Hire
- Requisitions
- Tasks

The number in the following two columns work as follows:

- The number in the column is specific to you (not to your user groups). It represents the number of items that are new or have been updated by another user since you last viewed them. For example, if you approve your own requisition, a “new” task is added to your Ready for sourcing tasks, and the number in this column for Ready for sourcing element increases by one.
- The number in the Total column represents the total number of items including new, previously viewed, and updated. For example, if you choose your user name in the Show list and Ready for sourcing appears in the Tasks channel, the number in the Total column represents the total number of your requisitions that are ready for sourcing.

**Links** redirect users to another part of the application. Links are supplied by Taleo and cannot be created nor edited. The following links are available:

- Create Requisition
- My Setup
- Onboarding Process
- Search Candidates
- Transitions
- View Candidates

A **mini requisition list** may be available in the center stage. This mini requisition list can be added in the center stage to allow users to access a candidate list directly from the home page without having to go through the standard requisition list page. This mini requisition list can contain up to four columns of summary information about each requisition, including the number of candidates. It can also display up to 30 requisitions (the ones with the most recent submission activity). This mini requisition list is used by default with the Hourly Manager center stage.

Note that the Mini Requisition list and the Requisitions channel cannot be put in the same center stage.
Configuring the Center Stage

The center stage configuration consists of the following steps.
1. Creating a center stage.
2. Activating the center stage.
3. Associating the center stage to a configuration profile.
4. Creating a Welcome title in the center stage.
5. Adding a separator line in the center stage.
6. Adding a footer text in the center stage.

Creating a Center Stage

**Prerequisite**
The Center Stage Configuration user type permission is required.
The Mini Requisition list and the Requisitions channel cannot be put in the same center stage.

**Configuration > [Recruiting] Administration > Center Stage**

**Steps**
1. Click Create.
2. Provide a code and a name.
3. Indicate if you want a single-column layout, a two-column layout, or a two-column layout with header.
4. Click Save.
5. Click Edit next to Channels and Links.
6. Click Add.
7. Select the desired channels and links.
8. Click Select.
9. If necessary, indicate in which columns you want to display the elements.
10. Indicate in which row you want to display the elements.
11. Click Save.

**Result**
The newly created center stage appears in the Center Stages list. The information displayed in the central pane of the home page is configured as specified.

**Next Step**
Activating the center stage.

Activating a Center Stage

**Prerequisite**
The center stage must have the inactive or draft status.
The Center Stage Configuration user type permission is required.

**Configuration > [Recruiting] Administration > Center Stage**

**Steps**
1. Click on the name of a center stage.
2. Click Activate.

**Result**
The center stage appears as active in the Center Stages list.

**Next Step**
Associating the center stage to a configuration profile.

---

**Associating a Center Stage to a Configuration Profile**

**Prerequisite**
The Center Stage must be created.

*Configuration > [SmartOrg] Administration > [Users] Configuration Profiles*

**Steps**
1. Click a configuration profile.
2. Click the Center Stage Configuration setting.
3. Click Edit.
4. Select a center stage in the Value field.
5. Click Save.

**Result**
The center stage is selected for the configuration profile and a configuration profile is tied to each user. Consequently, depending on the user logging in the Recruiting Center, the information displayed in the central pane of the home page will differ.

---

**Creating a Welcome Title**

**Prerequisite**

*Configuration > [SmartOrg] Configuration > [Users] Configuration Profiles*

**Steps**
1. Click a configuration profile.
2. Click the Center Stage-Welcome Title setting.
3. Select Yes.
4. Click Save.
5. If you want to have a different Welcome title, contact Oracle Support.
6. In the SmartOrg Configuration Profiles feature, activate the Center Stage-Welcome Title setting.

**Result**
The word Welcome followed by the name of the user signing in will be displayed to the user when logging in the Recruiting Center. It is possible to modify the word Welcome; contact Oracle Support for details.

---

**Adding a Separator Line**

**Prerequisite**
A center stage must be created and activated.

*Configuration > [SmartOrg] Administration > [Users] Configuration Profiles*
Steps
1. Click a configuration profile.
2. Click the Center Stage - Separator Line setting.
3. Click Edit.
4. Select Yes.
5. Click Save.

Result
A line is added between the Welcome title and the content of the center stage.

Creating a Page Footer

Prerequisite
You must first submit the desired text to Oracle Support. Text must be supplied for all active languages. The text area supports up to 50 characters.
You can use basic HTML formatting such as color, bold, and italics. You cannot embed hyperlinks.

Configuration > [SmartOrg] Configuration > [Users] Configuration Profiles

Steps
1. Click a configuration profile.
2. Click the Center Stage Footer Text setting.
3. Select Yes.
4. Click Save.

Result
The footer text is displayed on the home page of the Recruiting Center.

Center Stage - Other Configuration Tasks

Deleting a Center Stage

Prerequisite
The Center Stage Configuration user type permission is required.
The center stage must be inactive.

Configuration > [Recruiting] Administration > Center Stage

Steps
Click Delete next to the center stage.

Result
The center stage is permanently deleted from the database.

Duplicating a Center Stage

Prerequisite
The Center Stage Configuration user type permission is required.
Configuration  >  [Recruiting] Administration  >  Center Stage

Steps
1. Click on the name of a center stage.
2. Click Duplicate.
3. Provide a code and a name.
4. Indicate if you want a single-column layout, a two-column layout, or a two-column layout with header.
5. Click Save.
6. Click Edit next to Channels and Links.
7. Click Add.
8. Select the desired channels and links.
9. Click Select.
10. If necessary, indicate in which columns you want to display the elements.
11. Indicate in which row you want to display the elements.
12. Click Save.

Result
The newly created center stage appears in the Center Stages list.

Next Step
Activating a center stage.

Deactivating a Center Stage

Prerequisite
The Center Stage Configuration user type permission is required.
The center stage must have the Active status.

Configuration  >  [Recruiting] Administration  >  Center Stage

Steps
1. Click on the name of the center stage.
2. Click Deactivate.

Result
The center stage appears as inactive in the Center Stages list. The center stage is no longer available in SmartOrg when associating a center stage to a configuration profile or user account.

Modifying a Center Stage Properties

Prerequisite
The Center Stage Configuration user type permission is required.

Configuration  >  [Recruiting] Administration  >  Center Stage

Steps
1. Click on the name of a center stage.
2. Click Edit next to Properties.
3. Modify the fields as required.
4. Click Save.

**Adding Channels and Links to a Center Stage**

**Prerequisite**
The center stage must be in the inactive or draft status.
The Center Stage Configuration user type permission is required.

*Configuration > [Recruiting] Administration > Center Stage*

**Steps**
1. Click on the name of a center stage.
2. Click Edit next to Channels and Links.
3. Click Add next to Channels and Links.
4. Select channels and links.
5. Click Select.
6. Click Save.

**Result**
When a user associated to that center stage will access the Recruiting Center, the channels and links will appear.

**Next Step**
Ordering channels and links as well as columns in the center stage.

**Ordering Channels and Links in a Center Stage**

**Prerequisite**
The center stage must be in the Inactive or Draft status.
The Center Stage Configuration user type permission is required.

*Configuration > [Recruiting] Administration > Center Stage*

**Steps**
1. Click on the name of a center stage.
2. Click Edit next to Channels and Links.
3. Specify the row order of each channel and link.
4. Click Reorder.
5. Click Save.

**Result**
When a user associated to that center stage will access the Recruiting Center, the channels and links will be displayed in the new order.

**Removing Channels and Links from a Center Stage**

**Prerequisite**
The center stage must be in the Inactive or Draft status.
The Center Stage Configuration user type permission is required.

*Configuration > [Recruiting] Administration > Center Stage*

**Steps**

1. Click on the name of a center stage.
2. Click Edit next to Channels and Links.
3. Click Remove next to the channels and links to be removed.
4. Click Save.

**Result**

The channels and links will no longer appear in the Center Stage page. When a user associated to that center stage will access the Recruiting Center, the removed channels and links will no longer be displayed.

---

**Setting the Layout of a Center Stage**

**Prerequisite**

The center stage must be in the Inactive or Draft status.

The Center Stage Configuration user type permission is required.

*Configuration > [Recruiting] Administration > Center Stage*

**Steps**

1. Click on the name of a center stage.
2. Click Edit next to Properties.
3. Select the desired layout.
4. Click Save.

**Result**

The center stage is laid out in one or two columns, or in two columns with a header.

**Next Step**

Organizing a multicolumn center stage.

---

**Organizing a Multicolumn Center Stage**

**Prerequisite**

The center stage must be in the Inactive or Draft status.

The Center Stage Configuration user type permission is required.

*Configuration > [Recruiting] Administration > Center Stage*

**Steps**

1. In the Center Stage Configuration page, click on the name of a center stage.
2. In the Center Stage page, click Edit next to Channels and Links.
3. In the Channel and Link Editor page, select a value in the Section drop-down list.
4. Click Save.

**Result**

Channels and links appear in the home page either on the right or left hand side of the page.
Creating Custom Instructions for a Center Stage Channel

The text appearing under the name of a channel in the center stage can be customized. For example, for the View Candidates channel, the following text could be modified: “View detailed information about your candidates”. Although no default text is supplied with the application, system administrators can send the text to Oracle Support who will then activate the text for the zone. For details, contact Oracle Support.
Communications Channel

Communications Channel

The Communications channel allows the display of useful information to Recruiting Center users.

The Communications channel is available in the Communications tab located in the supporting tools panel in the right-hand side of the home page. The Communications channel provided by default is made up of three sections, each being expandable and collapsible.

- Customer Support: May contain information to contact Oracle Support.
- Documentation Center: Contains a Documentation link giving access to supporting information such as the latest release notes.
- Resource Center: Contains a Resource Center link giving access to information about the hiring cycle, articles, research content, and more.

Configuring the Communications Channel

Many options exist to display or not the Communications channel to Recruiting Center users. For each configuration profile, customers can define the appropriate approach to take.

By deploying the Communications channel, you can display different information at different levels of customization to different user populations, depending on the level of information that needs to be shared with the groups of users.
Communications channel - Disabled

The Communications channel can be disabled and therefore not displayed in the Recruiting Center. Note that the online help and online tours still appear. For details, see Disabling the Communications Channel.

Communications channel - Default

The Communications channel can be displayed in the Taleo standard format which contains the following sections:

- Customer Support: Displays text to contact Oracle Support.
- Documentation Center: Contains text as well as a Documentation link giving access to supporting information such as the latest release notes.
- Resource Center: Contains text as well as a Resource Center link giving access to information about the hiring cycle, articles, research content, and more.

For details, see Enabling the Default Communications Channel.

For the Customer Support section, you have the ability to enable the section and customize text for each configuration profile. Note that if the Customer Support section is enabled, but the Customer Support Text is empty, then the default text provided in the Customer Support String setting will be displayed. For details, see Customizing Text in the Customer Support Section.

For the Documentation Center section, it is Oracle Support who enables the Communication Channel: Documentation URL protected setting (Configuration > [Recruiting] Settings). This setting is used to enter the URL of the HTML page displayed when clicking the Documentation Center link in the Communications channel.

For the Resource Center section, it is Oracle Support who enables the Taleo Resources Center URL protected setting (Configuration > [General Configuration] Settings). This settings used to enter the URL of the HTML page displayed when clicking the Resource Center link in the Communications channel.

Communications channel - Customized

The Communications channel can be customized by configuration profile.

A Customer Support section can be displayed. As for the default Communications channel, you have the ability to enable the section and customize text for each configuration profile. For details, see Customizing Text in the Customer Support Section.

The following elements in the Communications channel can be customized:

- title
- text
- link
- link tooltip
- link URL
For details see, *Customizing the Communications Channel*.

**Communications channel - HTML Customized**

You have to specify the URL of the HTML page to be displayed in the Communications channel. For details, see *Setting the URL for the HTML Customized Communications Channel*.

**Disabling the Communications Channel**

**Prerequisite**

*Configuration > [SmartOrg] Administration > [Users] Configuration Profiles*

**Steps**

1. Click on a configuration profile.
2. Click on the Communication Channel Mode setting.
3. Click Edit.
4. Select Disabled.
5. Click Save.

**Result**

The Communications channel is disabled and is not displayed in the Recruiting Center.

You can also hide the Communications channel by not granting the Access external Web Sites permission. Note that when this permission is not granted to users, the Communications, Help, and Clips tabs will all be hidden.
Enabling the Default Communications Channel

Prerequisite

Configuration > [SmartOrg] Administration > [Users] Configuration Profiles

Steps

1. Click on a configuration profile.
2. Click on the Communication Channel Mode setting.
3. Click Edit.
4. Select Default.
5. Click Save.

Customizing the Communications Channel

Prerequisite

The Communication Channel Mode setting in the user’s configuration profile must be set to Customized.

Configuration > [SmartOrg] Administration > [Users] Configuration Profiles

Steps

1. Click on a configuration profile.
2. To customize the title of the section in the Communications channel, click on the Communication Channel - Custom Section Title setting.
3. To customize the text in the Communications channel, click on the Communication Channel - Custom Section Text setting.
4. To customize the text of the link that brings users to an HTML page containing information, click on the Communication Channel - Custom Section Link setting.
5. To customize the tooltip of the link, click on the Communication Channel - Custom Section Link Tooltip setting.
6. To customize the URL of the custom page in the Communications channel, click on the Communication Channel - Custom Section Link URL.
   If the setting is empty, then the Communications channel will be blank.
7. Click Save.

Setting the URL for the HTML Customized Communications Channel

Prerequisite

The Communication Channel Mode setting in the user’s configuration profile must be set to HTML Customized.

The HTML Customized mode requires that Flash Player be set in transparent/opaque mode.

Configuration > [SmartOrg] Administration > [Users] Configuration Profiles

Steps

1. Click on a configuration profile.
2. Click on the Communication Channel - HTML Custom section URL setting.
3. Click Edit.
4. Enter a URL.
   If no content is provided or if content is invalid, the Communications channel will be displayed blank or with an error message.
5. Click Save.

**Result**
The URL is loaded in an iFrame and replaces the Communications channel section. The HTML customized URLs can be the same or can be different for each individual configuration profile.

### Customizing Text in the Customer Support Section

**Prerequisite**
The Communication Channel Mode setting in the user’s configuration profile must be set to Default or Customized.

The Customer Support Section setting in the user’s configuration profile must be set to Yes.

*Configuration > [SmartOrg] Administration > [Users] Configuration Profiles*

**Steps**
1. Click on a configuration profile.
2. Click on the Customer Support Text setting.
3. Click Edit.
4. Enter the desired text for each activated language.
5. Click Save.

**Result**
The text is displayed in the Customer Support section of the Recruiting Center Communications channel.

Note that if the Customer Support section is enabled, but the Customer Support Text is empty, then the default text provided in the Customer Support String setting will be displayed.

### Communications Channel - Settings

<table>
<thead>
<tr>
<th>Setting</th>
<th>Possible Values</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communication Channel Mode</td>
<td>Default, Customized, HTML customized, Disabled</td>
<td>Default</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] Configuration Profiles</td>
</tr>
<tr>
<td>Communication Channel - Custom Link</td>
<td>Custom</td>
<td>Communication Channel - Custom Link</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] Configuration Profiles</td>
</tr>
<tr>
<td>Customer Support Section</td>
<td>Yes, No</td>
<td>No</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] Configuration Profiles</td>
</tr>
<tr>
<td>Setting</td>
<td>Possible Values</td>
<td>Default Value</td>
<td>Location</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>-----------------</td>
<td>-------------------------------------------------------------------------------</td>
<td>-----------------------------------------------</td>
</tr>
<tr>
<td>Communication Channel - Custom Link Tooltip</td>
<td></td>
<td></td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] Configuration Profiles</td>
</tr>
<tr>
<td>Communication Channel - Custom Text</td>
<td></td>
<td></td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] Configuration Profiles</td>
</tr>
<tr>
<td>Communication Channel - Custom Title</td>
<td></td>
<td></td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] Configuration Profiles</td>
</tr>
<tr>
<td>Communication Channel - HTML Custom URL</td>
<td></td>
<td></td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] Configuration Profiles</td>
</tr>
<tr>
<td>Communication Channel - Custom Link URL</td>
<td></td>
<td></td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] Configuration Profiles</td>
</tr>
<tr>
<td>Communication Channel: Documentation URL</td>
<td></td>
<td></td>
<td>Configuration &gt; [Recruiting] Settings - Protected setting</td>
</tr>
<tr>
<td>Taleo Resources Center URL</td>
<td></td>
<td></td>
<td>Configuration &gt; [General Configuration] Settings - Protected setting</td>
</tr>
<tr>
<td>Customer Support String</td>
<td></td>
<td></td>
<td>Configuration &gt; [General Configuration] Settings - Protected setting</td>
</tr>
</tbody>
</table>
Theme and Logo

Color Theme
The theme is the color used to highlight the core navigation bar (or navigation ribbon) in Taleo Enterprise products.

Skyros Theme
The Oracle Fusion Skyros theme is available for Taleo Enterprise products. The Skyros theme is the default theme for new customers. Existing customers can keep their current theme, but have the possibility to change the default theme to Skyros in the product settings.

The Skyros theme provides a blue header. Because of the blue header, organization logos that have a white background are not recommended for use with this theme.

A product setting "Overlay Organization Logo" is available for use in conjunction with the Skyros theme. This setting only works with the Skyros theme. This setting is used to download a logo. Logos with a transparent background are required for this setting. Transparent PNGs are supported and recommended. The image dimensions cannot exceed 280 x 40 pixels.

For the best user experience, the logo used with the Skyros theme should be a light color, preferably white, with a transparent background.

### Default Theme
The following color themes are provided.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Default value at migration</th>
<th>Default value for new zone</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overlay Organization Logo</td>
<td>OverlayCompanyLogo.png</td>
<td>OverlayCompanyLogo.png</td>
<td>Configuration &gt; [General Configuration] Settings</td>
</tr>
<tr>
<td>Default Theme</td>
<td>Current</td>
<td>Skyros</td>
<td>Configuration &gt; [General Configuration] Settings</td>
</tr>
</tbody>
</table>

Taleo (default) | Aqua | Sand

Ice | Silver | Skyros
A default theme is selected by system administrators. However, Recruiting Center users can modify the default theme in their user preferences (My Setup > Preferences tab).

**Selecting a Default Theme**

**Prerequisite**

Only one color theme can be displayed per zone.

*Configuration > [General Configuration] Settings*

**Steps**

1. Click the Default Theme setting.
2. Click Edit.
3. Select the desired theme color.
4. Click Save.

**Result**

Color selected for body text, headings and links is displayed to user.

**Selecting the Skyros Theme**

**Prerequisite**

Logos with a transparent background are required for this setting. Transparent PNGs are supported and recommended. The image dimensions cannot exceed 280 x 40 pixels.

Only one color theme can be displayed per zone.

*Configuration > [General Configuration] Settings*

**Steps**

1. Click the Overlay Organization Logo setting.
2. Click Edit.
3. Select the desired logo.
4. Click Save.
5. Click the Default Theme setting.
6. Click Edit.
7. Select the Skyros theme color.
8. Click Save.

**Giving the Permission to Overwrite the Selected Theme**

**Prerequisite**

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

1. Click a user type.
2. Click Recruiting.
3. Click Edit next to Other.
4. Select the Access the "Preferences" section in 'My Setup' menu permission.
5. Click Save.

**Result**

Users having this user type will be able to overwrite the default theme in their user preferences.

**Selected Item Color**

Color displayed when selecting elements in the user interface.

The following colors are provided:

- Green
- Soft blue (default)
- Yellow
- Blue (inverted)
- Dark (inverted)

A default color is selected by system administrators. However, Recruiting Center users can modify the default color in their user preferences (My Setup > Preferences tab).

The Dark (inverted) color is a high contrast color scheme for visually impaired users.

**Selecting the Selected Item Color**

**Prerequisite**

Only one color can be displayed per zone.

**Configuration** > [General Configuration] Settings

**Steps**

1. Click the Selected Item Default Color setting.
2. Click Edit.
3. Select the desired color.
4. Click Save.

**Giving the Permission to Overwrite the Selected Item Color**

**Prerequisite**

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

**Steps**

1. Click a user type.
2. Click Recruiting.
3. Click Edit next to Other.
4. Select the Access the "Preferences" section in 'My Setup' menu permission.
5. Click Save.

**Result**

Users having this user type will be able to overwrite the default selected item color in their user preferences.

**Logo**

A logo can be displayed in the upper left corner of Taleo applications pages.

A limit of one logo can be defined by zone. By default, the Taleo logo is displayed. Logo requirements are:

- PNG format.
- Maximum image size is 280 px by 40 px. A margin of 10 px is maintained (left, top, and bottom) outside the image box. An image with smaller dimensions is acceptable. However, it must not be stretched to fill the placeholder.
- Alpha channel is required to support background transparency in the near future.
- The image must be aligned horizontally to the left and vertically to the center within the placeholder.

**Uploading an Organization Logo**

**Prerequisite**

A limit of one logo can be uploaded per zone.

The logo must be in a PNG format.

The maximum image size is 280 px by 40 px. A margin of 10 px is maintained (left, top, and bottom) outside the image box. An image with smaller dimensions is acceptable. However, it must not be stretched to fill the placeholder. The image must be aligned horizontally to the left and vertically to the center within the placeholder.

**Configuration** > [General Configuration] Settings

**Steps**

1. Click the Organization Logo setting.
2. Click Edit.
3. Click Browse to select the file containing the company logo.
4. Click Save.
Online Tour and Online Help

Online Help

The Recruiting Center offers comprehensive help about concepts or tasks to perform. The online help is available in the Help tab located in the supporting tools panel in the right-hand side of all pages. When clicking the Help tab, a table of contents of available help topics is displayed. It is also possible to search the help database to locate specific subjects.

Displaying the Online Help in the Recruiting Center

Prerequisite

This task can only be performed by Oracle Support.

Configuration > [General Configuration] Settings

Steps

1. Click the Taleo Online Help URL protected setting.
2. Click Edit.
3. Enter the target URL to Recruiting Center online help.
4. Click Save.

Disabling the Online Help in the Recruiting Center

Prerequisite

Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Other

Steps

You can hide the Help tab by not granting the Access external Web Sites permission.

Note that when this permission is not granted to users, the Communications, Help, and Clips tabs will all be hidden.

Online Tour

The Recruiting Center offers short clips describing essential user interface elements.

These online tours are short clips that present basic information about the design, navigation and certain features of the application. Each clip is no more than one minute in length to give users a quick way to get up to speed with how to use the product.
These tours are available in the Recruiting Center. When enabled, they are available in the Clips tab located in the supporting tools panel on the right.

By default, online tours designed by Taleo come with the product. Taleo reserves the right to add new online tours, modify existing tours or delete tours at any time without notice to customers.

The tab where these online tours are available is configurable. Customers may choose to disable the tab or replace the content with their own content linking to alternative learning materials for their end users.

All online tours have been built using Taleo Proficiency, Taleo’s custom online learning tool for an ever changing environment. For customers choosing to create custom content using Taleo Proficiency, the standard online tour content can be purchased as starting material. Contact Oracle Support to learn more about Taleo Proficiency and/or purchasing the online tour content.

**Online Tour Creation Guidelines**

Customers should evaluate the content of the Taleo online tours to determine if it is appropriate given the context of their own deployment. For customers choosing to deploy their own custom online tours, here are some guidelines about what to consider when building this material:

- Focus on the minimum information a new user needs to know in the first few hours of using the product. The concepts have to be focused; otherwise, the online tours will fail.
- Keep each online tour under one minute in length so as to not lose the user's attention.
- Retention of concepts is significantly improved if a user can try to do immediately afterwards what the online tour was explaining. Use the Taleo Proficiency “See It and then Try It” mode to let the user try what they have just seen.
- Online tours are not eLearning tutorials. eLearning tutorials provide steps to achieve something. If you want to include true eLearning in the Online Tours section, we recommend that you clearly distinguish your online tours content from more in depth eLearning content, and present the online tours content first. Then, use the online tours to explain concepts and prompt users awareness of some issues. Use eLearning content to provide the additional details that are not in the online tour.
- Neither online tours nor eLearning tutorials should be designed to "replace" user manuals or online help. These mediums are not useful for reference. They cannot be indexed or searched. Users tend not to reflect on information presented in video format, but to act on it. So present information in this medium that aligns with this format.

**Uploading Default Taleo Online Tours**

**Prerequisite**

This task can only be performed by Oracle Support.

*Configuration > [Recruiting] Settings*

**Steps**

1. Click the Online Clips setting.
2. Click Edit.
3. In the Value list, select Taleo Standard (default).
4. Click Save.
5. Click the Taleo Recruiting Online Clips URL protected setting.
6. Enter the target URL to Taleo Recruiting online tours.
7. Click Save.
Uploading Custom Online Tours

**Prerequisite**

*Configuration > [Recruiting] Settings*

**Steps**

1. Click the Online Clips setting.
2. Click Edit.
3. In the Value list, select HTML Customized.
4. Click Save.
5. Click the Online Clips - HTML Customized URL setting.
6. Enter the target URL to the customized online tours.
   - Note that one URL must be provided per language. And a URL must be provided for every active language.
7. Click Save.

Disabling Online Tours

**Prerequisite**

*Configuration > [Recruiting] Settings*

**Steps**

1. Click the Online Clips setting.
2. Click Edit.
3. In the Value list, select Disabled.
4. Click Save.

**Result**

Online tours will not be available in the Recruiting Center and the Clips tab will be hidden.

You can also hide the Clips tab by not granting the Access external Web Sites permission. Note that when this permission is not granted to users, the Communications, Help, and Clips tabs will all be hidden.
Other Page Layout Elements

Creating a Page Header

Prerequisite
You must first submit the desired text to Oracle Support. Text must be supplied for all active languages.
The text area supports up to 50 characters.
You can use basic HTML formatting such as color, bold, and italics. You cannot embed hyperlinks.

Steps
1. Click a configuration profile.
2. Click the Recruiting Header Text setting.
3. Select Yes.
4. Click Save.

Result
The header text will be displayed at the top of all pages in the Recruiting Center.

Creating a Page Footer

Prerequisite
You must first submit the desired text to Oracle Support. Text must be supplied for all active languages.
The text area supports up to 50 characters.
You can use basic HTML formatting such as color, bold, and italics. You cannot embed hyperlinks.

Steps
1. Click a configuration profile.
2. Click the Center Stage Footer Text setting.
3. Select Yes.
4. Click Save.

Result
The footer text is displayed on the home page of the Recruiting Center.

Creating a Welcome Title

Prerequisite

Steps
1. Click a configuration profile.
2. Click the Center Stage-Welcome Title setting.
3. Select Yes.
4. Click Save.
5. If you want to have a different Welcome title, contact Oracle Support.
6. In the SmartOrg Configuration Profiles feature, activate the Center Stage-Welcome Title setting.

**Result**
The word Welcome followed by the name of the user signing in will be displayed to the user when logging in
the Recruiting Center. It is possible to modify the word Welcome; contact Oracle Support for details.

### Adding a Separator Line

**Prerequisite**
A center stage must be created and activated.

**Configuration** > [SmartOrg] Administration > [Users] Configuration Profiles

**Steps**
1. Click a configuration profile.
2. Click the Center Stage - Separator Line setting.
3. Click Edit.
4. Select Yes.
5. Click Save.

**Result**
A line is added between the Welcome title and the content of the center stage.

### Creating Custom Instructions for the Forgot Password Message

**Prerequisite**

**Configuration** > [General Configuration] Settings

**Steps**
1. Click the System Administrator Phone Number setting.
2. Click Edit.
3. Enter text in the Value field. This text will appear in the Forgot Password message that is displayed when
a user makes a mistake at login.
4. Click Save.

### About Window

In the Recruiting Center, Recruiting Administration, SmartOrg, Onboarding, Performance and Career Section
Administration products, the About window displays the following information:

- service pack information (always displayed)
- version information (always displayed)
- legal statement regarding IP protection (displayed if setting enabled)

The legal statement is required mostly for Federal customers. The legal statement will appear as follows:

“Use, reproduction, or disclosure is subject to restrictions set forth in Subcontract No. [Subcontract Number(s)]
with Taleo Corporation.”
Configuration

To display a legal statement in the About window, a subcontract number must be entered in the following setting. Contact Oracle Support to enter or modify the value.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subcontract Number</td>
<td>Enter the subcontract number of the agreement in regards to restrictions on use, reproduction or disclosure.</td>
<td>None</td>
<td>Configuration &gt; [General Configuration] Settings</td>
</tr>
</tbody>
</table>

Callout

A callout is a small window or bubble containing information on an element.

Callouts are available throughout the application. To see information contained in a callout, users must place their mouse over the element.

No configuration is required for the callouts. If a user has access to a specific area based on permissions and that area has a callout, the user will be able to see the callout. If there is content that the user cannot see based on the user’s permissions and the callout behavior, the field label will be displayed, but the field will be blank. For example, if a user does not have the permission to see the name of internal candidates, the user will still have access to the callout, but the name will show as blank for internal candidates.

<table>
<thead>
<tr>
<th>Callout</th>
<th>Fields in the Callout</th>
<th>Where the Callout is Used</th>
<th>Security Level/Field Availability Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attendee Callout</td>
<td>First Name, Last Name, Home Phone, Cellular Phone, Work Phone, Email.</td>
<td>In the Schedule an Interview wizard.</td>
<td>None</td>
</tr>
<tr>
<td>CSW Callout</td>
<td>Step Name, Step Information.</td>
<td>In the Change Step and Status screen of the requisition-specific candidate list.</td>
<td>None</td>
</tr>
<tr>
<td>Requisition Callout - Small</td>
<td>Requisition Title (with an hyperlink to the file), Requisition ID, Activated Languages, Activated Features (such as ACE Alert, Daily Recruiting Report, Urgent Need, Prevent Posting).</td>
<td>In the Requisitions list and Tasks list (in the Requisition column). For security reasons, the requisition callout on the Tasks list will show the callout. However, there will be no access to the requisition for all tasks that are in the Approve Requisition or Approve Offer status for any users. The user can get access to view a PDF of the requisition from within the Approval screen.</td>
<td>None</td>
</tr>
<tr>
<td>Requisition Callout - Large</td>
<td>Requisition Title (with an hyperlink to the requisition file), Requisition ID, Status,</td>
<td>In the Requisition Selector of the Match Candidates to Requisitions wizard, the</td>
<td>None</td>
</tr>
<tr>
<td>Callout</td>
<td>Fields in the Callout</td>
<td>Where the Callout is Used</td>
<td>Security Level/Field Availability Impact</td>
</tr>
<tr>
<td>-------------------------</td>
<td>-------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>------------------------------------------</td>
</tr>
<tr>
<td>Candidate Callout</td>
<td>Candidate Name (with an hyperlink to the file), Home Phone, Cellular Phone, Work Phone, Email.</td>
<td>In the Tasks list (in the Candidate column), the Offers list (in the Candidate column), the Search Results list, the requisition-specific candidate list, the Candidates list, the candidate submission list.</td>
<td>Field security level permissions and field availability are taken into consideration.</td>
</tr>
<tr>
<td>Candidate Comment Callout</td>
<td>Comment content.</td>
<td>In the candidate file History tab.</td>
<td>None</td>
</tr>
<tr>
<td>Requisition Comment Callout</td>
<td>Comment content.</td>
<td>In the requisition file History tab.</td>
<td>None</td>
</tr>
<tr>
<td>Task Callout</td>
<td>Task name (with an hyperlink to the file), Task Type, Assignment Date, Owner.</td>
<td>In the Tasks list (in the Task column).</td>
<td>None</td>
</tr>
<tr>
<td>Task Comment Callout</td>
<td>Comment content.</td>
<td>In the Tasks list (in the Comment column).</td>
<td>None</td>
</tr>
<tr>
<td>Submission Active/Inactive Callout</td>
<td>Requisition Title (with an hyperlink to the file), Step/Status, Comment.</td>
<td>In the candidate card of the candidate file.</td>
<td>The requisition title viewing permission is ignored; only submissions the user can see will be listed.</td>
</tr>
<tr>
<td>List Format Callout</td>
<td>List format information.</td>
<td>In the Requisitions list, the Mini Requisition list, the requisition-specific candidate list, the All Candidate by Requisition list, the All Candidates by Folder list, the All Candidates by Offer list, the quick search results list, the advanced search results list, the candidate capture/possible duplicates list of automatically pooled candidates.</td>
<td>None</td>
</tr>
<tr>
<td>Callout</td>
<td>Fields in the Callout</td>
<td>Where the Callout is Used</td>
<td>Security Level/Field Availability Impact</td>
</tr>
<tr>
<td>------------------------------------</td>
<td>--------------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------</td>
<td>------------------------------------------</td>
</tr>
<tr>
<td>Message Template Callout</td>
<td>Message title, information, structure.</td>
<td>In the Send Correspondence wizard, when selecting a message template.</td>
<td>None</td>
</tr>
<tr>
<td>Message Paragraph Callout</td>
<td>Paragraph title, preview of paragraph body (in active language).</td>
<td>In the Send Correspondence wizard, when the message template selected contains many paragraphs.</td>
<td>None</td>
</tr>
<tr>
<td>Group Callout</td>
<td>User Name, Employee ID, Job Title, Email, Department.</td>
<td>In the Requisitions list, the Candidates list, the Offers list.</td>
<td>None</td>
</tr>
<tr>
<td>Create Candidate Callout</td>
<td>For job-specific submission: Selected Language, Selected Requisitions. For general profile: Selected Language, Folder location and name.</td>
<td>In the Create a Candidate wizard.</td>
<td>None</td>
</tr>
<tr>
<td>Create Candidate Flow Description Callout</td>
<td>Create candidate flow title and description.</td>
<td>In the Create a Candidate wizard when selecting a candidate file creation template.</td>
<td>None</td>
</tr>
<tr>
<td>Most Advanced Progression Status Callout</td>
<td>Requisition Title (with an hyperlink to the file if the user has the required permission), Requisition ID, Status, date when moved into that status.</td>
<td>In the Candidates list, in the Most Advanced Progression Status column.</td>
<td>If a user does not have the permission to see the Most Advanced Requisition, the hyperlink to the requisition will not be available.</td>
</tr>
<tr>
<td>Disqualification Question Explanation Callout</td>
<td>Disqualification Question Explanation Title, Disqualification Question Explanation Comment.</td>
<td>In the Disqualification Questions library (Detailed mode), the requisition file and the candidate submission.</td>
<td>None</td>
</tr>
<tr>
<td>User Information Callout</td>
<td>First Name, Last Name, Title (of user), ID (of user), Email Address, Work Phone Number, Extension, Fax Number.</td>
<td>In the User Selector available in the Share Candidate wizard, Request Approval wizard and Request Contribution wizard.</td>
<td>None</td>
</tr>
<tr>
<td>Requisition Template Callout</td>
<td>Requisition Template Title, Job Code, Status, Requisition Type, User Group, Recruiter.</td>
<td>In the Requisition Template Selector when selecting a template for a requisition file.</td>
<td>None</td>
</tr>
<tr>
<td>Requisition Template List Callout</td>
<td>Requisition Template Title, Activated Languages.</td>
<td>In the Requisition Templates library.</td>
<td>None</td>
</tr>
<tr>
<td>Attachment Callout</td>
<td>Candidate Name, Job Specific Attachments, Other Attachments.</td>
<td>In the Candidates lists.</td>
<td>Users must have the Access Attachments tab permission to see the callout.</td>
</tr>
<tr>
<td>Callout</td>
<td>Fields in the Callout</td>
<td>Where the Callout is Used</td>
<td>Security Level/Field Availability Impact</td>
</tr>
<tr>
<td>----------------------------</td>
<td>--------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------</td>
<td>------------------------------------------</td>
</tr>
<tr>
<td>Primary Location Callout</td>
<td>Primary Location, Country, State/Province, Region, Address, City, Zip/Postal Code.</td>
<td>In the left pane of requisitions and requisition templates.</td>
<td>None</td>
</tr>
<tr>
<td>Screening Description</td>
<td>Screening Description.</td>
<td>In the job submission Screening block.</td>
<td>None</td>
</tr>
<tr>
<td>Callout</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Transitions Processes in Recruiting

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- E-Offer Processes ................................................................................................... 609
- Offboarding Processes ............................................................................................ 610
Transitions Processes in the Recruiting Center

Taleo Transitions, a "new generation" onboarding product, provides a unified, automated and customizable system for transitioning candidates and employees. Transitions processes can be started in the Recruiting Center and several elements and actions have been added to the Recruiting Center to integrate with Taleo Transitions.

Processes are created in Taleo Transitions. A process is a series of steps typically performed by multiple stakeholders. All necessary steps must be completed before the process acquires the "Complete" status. Depending on the type of Transitions process, a process can be started from the Recruiting Center or using Taleo Connect or Web Services.

There are four types of Transitions processes. The first three types can be started in the Recruiting Center.

- **Pre-Hire**
- **New Hire**
- **E-Offer**
- **Offboarding**

**Viewing Transitions Processes via Channels**

The Recruiting Center center stage provides two channels to view Transitions processes:

- Pre-Hire channel
- New Hire channel

Another channel called Transitions provides links to access processes in the Transitions Center.

Note that the Tasks channel contains links to the user's Transitions tasks that are due today, are overdue, or whose status is "In Progress".

**Actions in the Recruiting Center that Affect Transitions Processes**

These actions performed by Recruiting Center users affect running Transitions.

- **Rescind Offer**: If a Transitions E-Offer process is currently running, an offer was extended, and a user selects the Rescind Offer action, this will cancel the Transitions E-Offer process and the offer status will be Rescinded. For any other type of Transitions process currently running, there is no effect, the process continues.

- **Capture Response**: If a user accepts or refuse an offer that was extended, there is no effect on a running Transitions E-Offer process; the process still continues. For any other type of Transitions process currently running, there is no effect, the process continues.

- **Reject Candidate**: If a user rejects a candidate, there is no effect on a running Transitions E-Offer process; the process still continues. For any other type of Transitions process currently running, there is no effect, the process continues.

- **Revert, Bypass, Change Step/Status**: If a candidate has an offer with the status Extended, the Revert, Bypass and Change Step/Status actions are not supported. For any other type of Transitions process currently running, including an E-Offer process, there is no effect; the process continues.
Pre-Hire and New Hire Processes

Candidate Selection Workflows can be configured such that users who have the necessary permissions can start or cancel Transitions prehire and new hire processes from the Recruiting Center for candidates on requisitions. When candidates reach a step and status (in a Candidate Selection Workflow) configured for Transitions processes, the following Transitions actions become available for selection in the More Actions list:

- Start Transitions Pre-Hire Process
- Cancel Transitions Pre-Hire Process
- Start Transitions New Hire Process
- Cancel Transitions New Hire Process

These types of Transitions process can be launched from any step of a Candidate Selection Workflow provided the step was configured for these actions and the Recruiting Center users have the required user type permissions.

When a Transition process is started, the event is recorded on the History tab of the candidate file. No event is recorded on the History tab, however, when a process is completed, suspended and resumed, or canceled.

These processes can also be started or canceled using Taleo Connect.

Starting Transition Process and Impact on SmartOrg User Accounts

Before starting a Transitions process for a candidate, it is important that Recruiting Center users ensure there is only one candidate record for the person. Performing a check for duplicates (More Actions list > Check for Duplicates) enables Recruiting Center users to determine if a candidate created multiple candidate profiles. If more than one candidate record is found for the person, Recruiting Center users are strongly encouraged to perform the Merge Candidate Files action before starting a Transitions process.

Starting a Transitions process for a candidate results in the creation of a user account in SmartOrg (assuming the candidate record is not already linked to a user account). Each person should have a single candidate record and it should be linked to a single SmartOrg user account.

Suppose a candidate is hired using candidate record "A" and a Transitions process is started. This action results in the creation of a linked user account "A" in SmartOrg. Suppose the person later creates a second candidate record “B” at the external career site and applies for a different job in the organization. If a Recruiting Center user does not perform the Check for Duplicates action and starts a Transitions process, an unnecessary user account "B" is created in SmartOrg. These two conflicting user accounts can easily become problematic for integrations, Learn accounts and single-sign-on configurations.

In addition, the two user accounts cannot be merged and even the two candidate records cannot be merged because each is associated with a distinct Transitions process. (Please see Automatically Deleting Old Transitions Processes). Such problematic situations can be avoided if Recruiting Center users perform the Check for Duplicates action and merge candidate records that refer to the same person before starting a Transitions process.

Configuration

To allow users to start and/or cancel Transitions prehire and new hire processes from the Recruiting Center, you need to add Transitions actions to Candidate Selection Workflow steps. See Adding the Transitions Actions in a CSW Step.

You must also grant these permissions to users so they can access these actions:

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiate a pre-hire process for a candidate</td>
<td>Configuration &gt; SmartOrg Administration &gt; Users &gt; User Types &gt; select a user type &gt; Recruiting &gt; Other</td>
</tr>
</tbody>
</table>
Adding Transitions Actions in a CSW Step

**Prerequisite**
The action must be activated.

*Configuration > [Recruiting] Administration > Candidate Selection Workflow>*

**Steps**

1. Click the Steps tab.
2. Click a step that is used in the desired CSW.
3. Click the Actions Usage tab.
4. Click Add...
5. Select the desired Transitions actions:
   - START NEWHIRE TRANSITION PROCESS
   - START PREHIRE TRANSITION PROCESS
6. Click Add.
E-Offer Processes

In the Recruiting Center, two E-Offer processes are available if system administrators have configured them. The standard E-Offer process simply allows candidates to accept or refuse offers. The advanced E-Offer process, which requires Taleo Transitions, allows candidates to accept or refuse offers, and provides additional tasks, forms, electronic signatures, etc. Provided all the right settings and permissions have been configured, the E-Offer process can be started from the Recruiting Center when an offer is extended to a candidate. If an E-Offer is rescinded in the Recruiting Center, the process is automatically canceled in the Transitions Center.

E-Offer processes can also be started or canceled using Taleo Connect.

For details on E-Offer, see *Extending an Offer Electronically (E-Offer)*.

**Configuration**

For details on how to configure the standard E-Offer process, see *Configuring the Standard Electronic Offer*.

For details on how to configure the advanced E-Offer process, refer to the *Taleo Transitions Configuration Guide*.
Offboarding Processes

Offboarding processes can be started and canceled using Taleo Connect or via Web Services from other software products. They can also be canceled in the Transitions Center.
Screening Services

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Screening Services

Screening Service

An organization may choose to have external partners provide specialized screening services.

A screening services partner can supply services such as:

- candidate assessment
- background check
- tax credit eligibility
- interview guides
- interview scheduling
- validated tests to identify and measure a candidate’s qualifications, motivations, abilities and eligibility

Screening services must be activated by Oracle Support before they can be used in a requisition flow. Services are sourced to the application using an external tool, and enabled by default if the service does not require any additional configuration.

Once a service is made available by Oracle Support, the service can be activated or deactivated by system administrators and made available or not to Recruiting Center users when creating a requisition.

All screening services have the same properties, however, the settings of these properties will vary according to the service. System administrators can configure the screening service that is, modify input fields, phases, etc.

The languages in which an external service is available depend on the languages used by the service providers and vendors.

Screening services are available to Recruiting Center users provided they have been granted the proper user type permission.

Configuration

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Screening Services configuration</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Administration</td>
</tr>
<tr>
<td>Services permissions are grouped under the Recruiting functional domain.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Other</td>
</tr>
</tbody>
</table>

When configuring a correspondence for a screening services integration, if selecting a message template that is not appropriately configured, the candidate will not be able to access that service.

Input Field

An input field is a specified area of the application where a user must enter or choose information that will be sent to request a partner service.

Input fields used in the application are specific to the service, therefore depending on the service used, the fields displayed in the application will differ from one service to another.

The properties of an input field are:
• Code: The internal name of the input field. The code is a read-only property.
• Name: The label of the field used in the requisition file. Depending on the service definition, the name can be an editable property.
• Domain: The type of field. The domain is a read only property. The possible values are:
  
  • Text
  • Multilingual text
  • Numerical
  • Selection
  • Date
  • Date UTC sensitive
  • Boolean

• Mandatory: If the service definition specifies the field as mandatory, then the input field will always be mandatory. If the service definition specifies the input field as optional, then the customer will be able to configure the field as being either mandatory or not.

• Default Value: this is the value of the field used by default by the system. Depending on the service definition, this can be an editable property.

Input fields are displayed in the requisition file under the Screening section.

Result Field

A result field is a field for which a partner service will send one result value per service request.

Result fields are specific to the service, therefore depending on the partner service used, the result fields displayed will differ from one service to another. When requesting an external partner service, the result fields will be displayed to the service partner to enter or select the results of the requested service.

The properties of a result field are:

• Domain: The type of field. The domain is a read only property. The possible values are:
  
  • Text
  • Multilingual text
  • Numerical
  • Selection
  • Date
  • Date UTC sensitive
  • Boolean

• Code: The internal name of the result field. The code is a read-only property.
• Name: The label of the field used to return results. Depending on the service definition, this can be an editable property.
• Default Value: depending on the service definition, this can be an editable property.

Result fields are never mandatory because the service partner can send the value of the results incrementally. Once the service partner sends results in their entirety to the application, the application from which the service was requested will use a predetermined user-defined form to display the results supplied by the partner.

Result Set Field

A result set field is a field for which the partner will send more than one result value per service request.

Result set fields are specific to the service, therefore depending on the partner service used, the fields displayed will differ from one service to another. When requesting an external partner service, the result set fields will be displayed to the service partner to enter or select the results of the selected service:
The properties of a result set field are:

- **Domain**: The type of field. The domain is a read only property. The possible values are:
  - Text
  - Multilingual text
  - Numerical
  - Selection
  - Date
  - Date time sensitive
  - Boolean
- **Code**: The internal name of the result set field. The code is a read-only property.
- **Name**: The label of the field used to return results. Depending on the service definition, this can be an editable property.
- **Default Value**: this is the value of the field used by default by the system. Depending on the service definition, this can be an editable property.

Result fields are never mandatory because the service partner can send the value of the results not all at once.
Taleo Assessment

Assessments

Assessments in the workplace are used to measure the knowledge, skills, abilities and behavioral attributes related to a job or corporate culture. They can also be referred to as screening services, tests, surveys, exams, evaluations, simulations, work samples, assessment centers, interview guides, or realistic job previews. Employers use assessments to hire applicants, develop and promote employees, and collect talent intelligence on internal and external talent pools.

Professional fields related to the scientific research, development and use of workplace assessments include Industrial Organizational (I/O) Psychology and Organizational Development (OD). Also, the fair use of workplace assessments is overseen at the state and federal level or the territory, national and regional/multinational level by various government organizations, such as the U.S. Equal Employment Opportunity Commission (EEOC).

Depending on their professional credentials, authors may also be involved with the following assessment services:

• Job Analysis – determines job-related competencies to include in the assessment.
• Validation Study – determines if the assessment is a reliable and valid measure of the selected competencies and to what degree it predicts job performance.
• Adverse Impact Analysis – determines if the assessment could potentially impact protected groups or promote unfair bias.
• Business Impact Study – determines the cost and time savings, or return on investment, from using a validated assessment over a period of time.

Configuring Taleo Assessments in Recruiting Administration

The configuration of Taleo Assessments in the Recruiting Administration consists of the following steps.

1. Assessments must be activated in the Assessment Authoring Center before they can be used in a requisition flow. Taleo authored assessments must be activated by Oracle Support. Taleo assessments are sourced to the application using an external tool and enabled by default if the service does not require any additional configuration. Contact Oracle Support for details.

2. Configuring Taleo Assessment settings.
3. Configuring Taleo Assessment input fields.
4. Configuring Taleo Assessment result fields.
5. Configuring Taleo Assessment user-defined forms.
6. Configuring the Taleo Assessment message displayed to candidates.
7. Configuring the Taleo Assessment candidate selection workflow.
8. Selecting message templates for the Taleo Assessment.
9. Activating Taleo Assessment.
10. Adding the Screening block in the requisition file.
11. Adding the Screening block in the candidate file.
Configuring Taleo Assessment Settings

Prerequisite
The Access Administration user type permission is required.

Configuration > [Recruiting] Administration > Screening Services

Steps
1. Click an assessment provided by Taleo.
2. Click Edit next to Properties.
3. In the Settings section, configure the assessment settings as desired. For details, see Assessment Settings.
4. Click Save.

Configuring Taleo Assessment Input Fields

Prerequisite
The Access Administration user type permission is required.

Configuration > [Recruiting] Administration > Screening Services

Steps
1. Click an assessment provided by Taleo.
2. Click the link under Input Fields.
3. Click Edit next to Properties.
4. Under Default Value, select the assessment that will appear by default in the assessment field located in the requisition Screening block. For details, see Assessment Input Fields.
5. Click Save.

Configuring Taleo Assessment Result Fields

Prerequisite
Taleo Assessment results fields are not configurable by the system administrator. For details, see Assessment Result Fields.

Configuring Taleo Assessment User-defined Forms

Prerequisite
The Access Administration user type permission is required.

Configuration > [Recruiting] Administration > Screening Services

Steps
1. Click an assessment provided by Taleo.
2. Under User-defined Forms, configure the following elements. For details, see Assessment User-defined Forms.
   - Capture of input fields: This is where you define how the Assessment Version 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.
• Display of input fields: This is where you define how the Assessment Version 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.
• Display of result fields: This is where you define how the Assessment result fields will appear in the candidate submission. Available fields are: Band, Details, Exceptional, Interview Guide, Passed, Score.
• Display of result set fields: This is used only for those external partners whose certification includes result set fields. Taleo Assessment does not use this kind of fields. Therefore, nothing to configure here.

3. Click Save.

### Configuring the Taleo Assessment Message Displayed to Candidates

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

*Configuration > [Recruiting] Administration > Screening Services*

**Steps**
1. Click an assessment provided by Taleo.
2. Click *Edit* next to Labels.
3. Select the language in which you want to create the message.
4. Complete the fields as desired. For details, see *Assessment Labels*.
5. Click *Save*.
6. Click *Preview* next to Labels to see how the message will appear to candidates.

### Configuring the Taleo Assessment Candidate Selection Workflow

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

*Configuration > [Recruiting] Administration > Screening Services*

**Steps**
1. Click an assessment provided by Taleo.
2. Click *Create* next to CSW Actions.
3. Complete the fields as desired. For details, see *Assessment Candidate Selection Workflow*.
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.

### Selecting Message Templates for the Taleo Assessment

Message templates are used either when the recruiter manually requests an assessment for a candidate, or when a candidate decides on the Career Section to receive an e-mail with a link to the Assessment service instead of taking the assessment immediately during the submission process.

**Prerequisite**
The Access Administration user type permission is required.
Steps
1. Click an assessment provided by Taleo.
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 where to take the Assessment.

Activating Taleo Assessment

Prerequisite
The Access Administration user type permission is required.
The screening service must be Draft.

Steps
1. Click an assessment provided by Taleo.
2. Click Activate located next to the name of the assessment.

Result
The status of the assessment is changed to Active. The Assessment is then available in the Recruiting Center and Career Section provided that the Assessment is included in a requisition and then the requisition is posted to a Career Section.

Adding the Screening Block in the Requisition File

Prerequisite
The user-defined file must have the inactive or draft status.
At least one section must be created in the user-defined file.

Steps
1. Click on a user-defined file of type Requisition File.
2. Click Edit next to Section Ordering.
3. Enter the name of the Screening section in the Add a Section field.
4. Click Create Section.
5. Select the Screening block in the Available Blocks section and drag and drop it to the Screening section you created.
6. Click Save.
Adding the Screening Block in the Candidate File

**Prerequisite**
The user-defined file must have the inactive or draft status.
At least one section must be created in the user-defined file.

*Configuration > [Recruiting] Administration > User-defined Files*

**Steps**
1. Click on a user-defined file of type Candidate File.
2. Click *Edit* next to Section Ordering.
3. Enter the name of the Screening section in the Add a Section field.
4. Click *Create Section*.
5. Select the Screening block in the Available Blocks section and drag and drop it to the Screening section you created.
6. Click *Save*.

Granting Taleo Assessment Permissions

The following permissions are used for Taleo Assessments.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request services from Taleo partners</td>
<td>Allows Recruiting Center users to request a Taleo Assessment service for candidates. The Request Screening Service is then available in the More Actions list.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Other</td>
</tr>
<tr>
<td>Access Taleo partners summary results</td>
<td>Allows Recruiting Center users to access summary results in the candidate submission file.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Other</td>
</tr>
<tr>
<td>Access Taleo partners detailed results</td>
<td>Allows Recruiting Center users to access detailed results regarding the assessment. The Provider Detailed Results link becomes available in the candidate submission file.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Other</td>
</tr>
</tbody>
</table>

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.

### Taleo Assessment Properties, Settings, and Fields in Recruiting Administration

The table presents the properties, settings, and fields used to configure Taleo Assessment in the Recruiting Administration.

<table>
<thead>
<tr>
<th>Assessment Property</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Name of the assessment.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Assessment &gt; [Properties] &gt; Edit</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the assessment.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Assessment &gt; [Properties] &gt; Edit</td>
</tr>
<tr>
<td>Provider Name</td>
<td>Name of the provider.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Assessment &gt; [Properties] &gt; Edit</td>
</tr>
<tr>
<td>Provider Description</td>
<td>Description of the provider.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Assessment &gt; [Properties] &gt; Edit</td>
</tr>
<tr>
<td>Type</td>
<td>Type of screening service.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Assessment &gt; [Properties] &gt; Edit</td>
</tr>
<tr>
<td>Assessment Property</td>
<td>Description</td>
<td>Location</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------</td>
<td>----------</td>
</tr>
<tr>
<td>Status</td>
<td>Status of the assessment. Possible values are Active, Inactive.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Assessment &gt; [Properties] &gt; Edit</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Assessment Setting</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
</table>
| Validity Period    | The validity period is the number of days that an assessment result is valid. If a candidate takes an assessment after the validity period, a request is made to the Assessment Authoring Center for an assessment. The Assessment Authoring Center will respond based on the behavior of the assessment configured in the Assessment Authoring Center. It is a Taleo best practice to use the setting “Defined by user” with a date range specified that will not exceed the validity of the assessment. Possible values are:  
  - Always valid: The results for a particular version received by Taleo Recruiting will remain valid for the life of the candidate. If the candidate applies to another position with the same version attached to the requisition, the candidate will NOT be presented with the Screening block in the application process.  
  - Defined by user: This is similar to Always valid by a time frame from when the assessment was completed is entered. A recruiter can therefore specify how long before a candidate would be required to retake an assessment.  
  - Defined by partner: The Screening block is always presented to candidates. When they click the link to take the assessment the Taleo Assessment application will determine, based on the assessment author's criteria, if they are allowed to retake it. If not, they are presented with a message. | Configuration > [Recruiting] Administration > Screening Services > Taleo Assessment > [Properties] > Edit |
<table>
<thead>
<tr>
<th>Assessment Setting</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidate must answer email within (in hours)</td>
<td>indicating that they have already completed the assessment.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Assessment &gt; [Properties] &gt; Edit</td>
</tr>
<tr>
<td>This service is mandatory for new requisitions and for those updated while in &quot;Draft&quot; status</td>
<td>Time frame in hours in which the candidate has to take an assessment. The assessment must be completed in the time frame specified.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Assessment &gt; [Properties] &gt; Edit</td>
</tr>
<tr>
<td>Access this service through the browser full-screen mode</td>
<td>If this setting is activated, the Assessment is mandatory on the requisition file, meaning that it is preselected in the Screening section and cannot be removed.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Assessment &gt; [Properties] &gt; Edit</td>
</tr>
<tr>
<td>Client Identifier</td>
<td>Name to identify the company as a customer. This value must be identical to the value defined in the Assessment Authoring Center.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Assessment &gt; [Properties] &gt; Edit</td>
</tr>
<tr>
<td>Delay to wait before timing out a request (in hours)</td>
<td>If using pop-up assessment delivery, this setting determines that the browser ignores the latest defined pop-up size and instead presents the assessment in full screen mode.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Assessment &gt; [Properties] &gt; Edit</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Assessment Input Field</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Version</td>
<td>The assessment version is selected by Recruiting Center users in the Screening block of the requisition. 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, Assessment Version. • Domain: The type of field. The domain is a read-only property. • Mandatory: If the service definition specifies the field as being</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Assessment &gt; Input Fields &gt; Version [Properties] &gt; Edit</td>
</tr>
<tr>
<td>Assessment Input Field</td>
<td>Description</td>
<td>Location</td>
</tr>
<tr>
<td>------------------------</td>
<td>-------------</td>
<td>----------</td>
</tr>
<tr>
<td></td>
<td>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.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Default Value: Assessment displayed by default in the requisition file.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Assessment Result Field</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Band</td>
<td>The band is the candidate global band.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Assessment &gt; Result Fields &gt; Band</td>
</tr>
<tr>
<td>Details</td>
<td>This is the label of the Details link displayed in the candidate job submission, under the Screening block.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Assessment &gt; Result Fields &gt; Details</td>
</tr>
<tr>
<td>DetailsUrl</td>
<td>This is the label for the URL used to request the interview guide (if enabled) from the Taleo Assessment application.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Assessment &gt; Result Fields &gt; DetailsUrl</td>
</tr>
<tr>
<td>Exceptional</td>
<td>No global bands have been denoted as “Exceptional” by Taleo. This value will always be “No” and is not relevant to the assessment interpretation.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Assessment &gt; Result Fields &gt; Exceptional</td>
</tr>
<tr>
<td>Passed</td>
<td>A status of “Yes” indicates that the candidate received a passing green or yellow global band. Passed status of “No” indicates that the candidate received a failing red global band.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Assessment &gt; Result Fields &gt; Passed</td>
</tr>
<tr>
<td>Score</td>
<td>The score is the candidate's global score. It is best to focus on the global band and dimension bands rather than the global score.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Assessment &gt; Result Fields &gt; Score</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Assessment User-Defined Form</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capture of input fields</td>
<td>This is where you define how the Assessment Version field (input field) will appear in the requisition file in Edit mode. You can define elements such</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Assessment &gt; User-defined Forms</td>
</tr>
<tr>
<td>Assessment User-Defined Form</td>
<td>Description</td>
<td>Location</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-------------</td>
<td>----------</td>
</tr>
<tr>
<td>as the field type (drop-down list, radio button) and if the field is mandatory.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Display of input fields</td>
<td>This is where you define how the Assessment Version 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 Assessment &gt; User-defined Forms</td>
</tr>
<tr>
<td>Display of result fields</td>
<td>This is where you define how the Assessment results fields will appear in the candidate submission. Available fields are: Band, Details, Exceptional, Interview Guide, Passed, Score.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Assessment &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 Assessment does not use this kind of fields. Therefore, nothing to configure here.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Assessment &gt; User-defined Forms</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Assessment Label</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Name</td>
<td>This is the name of the service. Default value: Assessment (AAWT)</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Assessment &gt; Labels</td>
</tr>
<tr>
<td>Label 1</td>
<td>Default value: We would like you to provide additional information that will help us evaluate your qualifications for the job.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Assessment &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.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Assessment &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 Assessment &gt; Labels</td>
</tr>
<tr>
<td>Link to Service</td>
<td>Default value: Fill out the assessment questionnaire</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Assessment &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 Assessment &gt; Labels</td>
</tr>
<tr>
<td>Assessment Label</td>
<td>Description</td>
<td>Location</td>
</tr>
<tr>
<td>------------------</td>
<td>-------------</td>
<td>----------</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 Assessment &gt; Labels</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Assessment CSW Action</th>
<th>Description</th>
<th>Location</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 Assessments &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 is not yet met.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Assessments &gt; CSW Actions</td>
</tr>
<tr>
<td>Status</td>
<td>The candidate must have this status when they reach the selected step or the action will not take place until this status is reached.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Assessments &gt; CSW Actions</td>
</tr>
<tr>
<td>Action</td>
<td>Send Online Screening Assessment</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Assessments &gt; CSW Actions</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>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Assessments &gt; CSW Actions</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Assessment Message Template</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message template (internal candidate)</td>
<td>Message templates are used either when the recruiter manually requests an assessment for a candidate, or when a candidate decides on the Career Section to receive an email with a link to the Assessment service instead of taking the assessment immediately during the submission process. A message template is selected for internal candidates.</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Assessment &gt; Correspondence</td>
</tr>
<tr>
<td>Message template (external candidate)</td>
<td>Message templates are used either when the recruiter manually requests an assessment for a candidate, or when a candidate decides on the Career Section to receive an email with a link to the Assessment service instead of taking the assessment immediately during the submission process. A message</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Assessment &gt; Correspondence</td>
</tr>
</tbody>
</table>
### 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 |

### Taleo Assessment Fields in the Recruiting Center

Illustrations presenting the assessment fields configured via the Recruiting Administration.
### 3. Screening

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Details</td>
</tr>
<tr>
<td>2</td>
<td>Passed</td>
</tr>
<tr>
<td>3</td>
<td>Score</td>
</tr>
<tr>
<td>4</td>
<td>Band</td>
</tr>
<tr>
<td>5</td>
<td>Exceptional</td>
</tr>
</tbody>
</table>
Scheduling Center

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.

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. Previewing a Screening Service User-defined Form
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.
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.

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 (drop-down 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 (drop-down 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.

Configuration > [Recruiting] Administration > Screening Services

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.

Configuration > [Recruiting] Administration > Screening Services

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).
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.

Taleo Scheduling Center Screening Service Properties, Settings, and Fields

<table>
<thead>
<tr>
<th>Taleo Scheduling Center Screening Service Property</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Value: Taleo Scheduling Center or Taleo Scheduling Center (Proctored)</td>
<td><em>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; [Properties] &gt; Edit</em></td>
</tr>
<tr>
<td>Description</td>
<td>Value: The Taleo Scheduling Center automatically schedules candidates you designate on calendars you can control.</td>
<td><em>Configuration &gt; [Recruiting] Administration &gt; Screening Services</em></td>
</tr>
<tr>
<td>Taleo Scheduling Center Screening Service Property</td>
<td>Description</td>
<td>Location</td>
</tr>
<tr>
<td>--------------------------------------------------</td>
<td>-------------</td>
<td>----------</td>
</tr>
<tr>
<td>Provider Name</td>
<td>Taleo</td>
<td>&gt; Taleo Scheduling Center &gt; [Properties] &gt; Edit</td>
</tr>
<tr>
<td>Provider Description</td>
<td>Taleo</td>
<td>&gt; Taleo Scheduling Center &gt; [Properties] &gt; Edit</td>
</tr>
<tr>
<td>Type</td>
<td>Scheduling Center</td>
<td>&gt; Taleo Scheduling Center &gt; [Properties] &gt; Edit</td>
</tr>
<tr>
<td>Status</td>
<td>Possible values are Active, Inactive.</td>
<td>&gt; Taleo Scheduling Center &gt; [Properties] &gt; Edit</td>
</tr>
<tr>
<td>Code</td>
<td>Code given to Taleo Scheduling Center.</td>
<td>&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>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Validity Period</td>
<td>Value: Always valid</td>
<td>&gt; Taleo Scheduling Center &gt; [Properties] &gt; Edit</td>
</tr>
<tr>
<td>Candidate must answer email within (in hours)</td>
<td>Value: 0</td>
<td>&gt; Taleo Scheduling Center &gt; [Properties] &gt; Edit</td>
</tr>
<tr>
<td>This service is mandatory for new requisitions and for those updated while in &quot;Draft&quot; status</td>
<td>This setting is not used by Taleo Scheduling Center.</td>
<td>&gt; Taleo Scheduling Center &gt; [Properties] &gt; Edit</td>
</tr>
<tr>
<td>Access this service through the browser full-screen mode</td>
<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>&gt; Taleo Scheduling Center &gt; [Properties] &gt; Edit</td>
</tr>
<tr>
<td>Client Identifier</td>
<td>Client ID is assigned when Taleo Scheduling Center is created.</td>
<td>&gt; Taleo Scheduling Center &gt; [Properties] &gt; Edit</td>
</tr>
<tr>
<td>Taleo Scheduling Center Screening Service Setting</td>
<td>Description</td>
<td>Location</td>
</tr>
<tr>
<td>-------------------------------------------------</td>
<td>-------------</td>
<td>----------</td>
</tr>
<tr>
<td>Delay to wait before timing out a request (in hours)</td>
<td>When a request times out the system will no longer try to receive a candidate appointment.</td>
<td><strong>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; [Properties] &gt; Edit</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Taleo Scheduling Center Screening Service Input Field Property</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
</table>
| AssessmentID | The calendar associated with the initial interview phase of the CSW. 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** |

| AssessmentId2-AssessmentId10 | 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** |
### Screening Service Input Field Property

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>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.</td>
<td><a href="##">Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; Result Fields &gt; Appointment</a></td>
</tr>
</tbody>
</table>

- **Default Value:** Calendar displayed by default in the requisition file.

### Screening Service Result Field

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointment</td>
<td>The status of the first phase appointment. The Recruiting administrator can change the name of the label of the field.</td>
<td><a href="##">Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; Result Fields &gt; Appointment</a></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>ApointmentStatus2-10</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><a href="##">Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; Result Fields &gt; ApointmentStatus1-10</a></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>DetailsUrl</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><a href="##">Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; Result Fields &gt; DetailsUrl</a></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>SchedulingError</td>
<td>The value, Taleo Scheduling Center returned an error, will appear if there is a communication error between 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><a href="##">Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; Result Fields &gt; SchedulingError</a></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<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><a href="##">Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; Result Fields &gt; SchedulingStatus</a></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<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><a href="##">Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; Result Fields &gt; SchedulingNoShowStatus</a></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary</td>
<td>The Recruiting administrator can change the name of the label of the field.</td>
<td><a href="##">Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; Result Fields &gt; Summary</a></td>
</tr>
<tr>
<td>Taleo Scheduling Center Screening Service User-Defined Form</td>
<td>Description</td>
<td>Location</td>
</tr>
<tr>
<td>------------------------------------------------------------</td>
<td>-------------</td>
<td>----------</td>
</tr>
<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>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Taleo Scheduling Center Screening Service Label</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<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</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; Labels</td>
</tr>
<tr>
<td>Taleo Scheduling Center Screening Service Label</td>
<td>Description</td>
<td>Location</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>-------------</td>
<td>----------</td>
</tr>
<tr>
<td>following questions. If you do so, you will lose all the information you have entered.</td>
<td></td>
<td></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>Location</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>
<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>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; CSW Actions</td>
</tr>
<tr>
<td>Action</td>
<td>Send Online Screening Assessment</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; CSW Actions</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>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Scheduling Center &gt; CSW Actions</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Taleo Scheduling Center Screening Service Correspondence</th>
<th>Description</th>
<th>Location</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</td>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Assessment &gt; Correspondence</td>
</tr>
<tr>
<td>Taleo Scheduling Center Screening Service Correspondence</td>
<td>Description</td>
<td>Location</td>
</tr>
<tr>
<td>--------------------------------------------------------</td>
<td>-------------</td>
<td>----------</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>
<td>Configuration &gt; [Recruiting] Administration &gt; Screening Services &gt; Taleo Assessment &gt; Correspondence</td>
</tr>
</tbody>
</table>

### 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 |
Screening Service - Other Configuration Tasks

Activating a Screening Service

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

The screening service must be inactive.

Configuration > [Recruiting] Administration > Screening Services

Steps
1. Click the name of a service.
2. 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.

Editing a Screening Service

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

Configuration > [Recruiting] Administration > Screening Services

Steps
1. Click the name of a service.
2. Click Edit next to Properties.
3. Modify the settings and properties as required.
4. Click Save.

Result
The modifications applied to the properties and settings of the service are displayed in the service page and in Recruiting Center under the Screening section of a requisition.

Deactivating a Screening Service

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

Configuration > [Recruiting] Administration > Screening Services

Steps
1. Click the name of a service.
2. Click Deactivate located next to the name of the service.

Result
The service is no longer available in the Recruiting Center when requesting a service.

Creating a Screening Service Field
A system administrator cannot create an input, result or result set field for a screening service.

Next Step
Editing a screening service field.

Configuring a Screening Service Field
Prerequisite
The Access Screening Services configuration and the Access Administration user type permissions are required.

Configuration > [Recruiting] Administration > Screening Services
Steps
1. Click the name of a service.
2. Click the name of a field.
3. Click Edit next to properties.
4. Edit the information.
5. Click Save.

Result
The input, result or result set fields of the screening service re customized to a specific need.

Deleting a Screening Service Field
A system administrator cannot delete an input, result or result set field of a screening service.

Next Step
Editing a screening service field.

Editing a Screening Service User-defined Form
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 a service.
2. Click on a user-defined form.
3. Make desired changes.
4. Click Save.

**Result**
The properties and fields of a screening service user-defined form are modified.

---

### Previewing a Screening Service User-defined Form

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

*Configuration > [Recruiting] Administration > Screening Services*

**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.

---

### Adding a Screening Service to a Candidate Selection Workflow

**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 a service.
2. Click *Create* next to CSW Action.
3. Select values in the fields as required.
4. Click *Save*.

**Result**
When the candidate selection workflow will be used in the Recruiting Center, the execution of the screening service will be carried out automatically.

---

### Removing a Screening Service from a Candidate Selection Workflow

**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 a screening service.
2. In the CSW Actions section of the service page, click Remove located beside the CSW you want to remove.

Result
This action will no longer be executed during the candidate selection workflow.

Editing 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 a service.
2. Click Edit next to Labels.
3. Complete the fields as required.
4. Click Save.

Result
When a screening request is sent to a candidate, labels will reflect changes in the e-mail sent to the candidate.

Next Step
Previewing a service label.

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.

Selecting a Message Template for a Screening Service

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 a service.
2. Click Edit next to Correspondence.
3. Click select
4. Select a Message template.
5. Click Select.
6. Click Save.

Result
The new templates will be used when requesting a screening service.

Deleting a Message Template from a Screening Service

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 a service.
2. Click Edit next to Correspondence.
3. Click Delete next to a message template
4. Click Save.

Result
The template can no longer be used when requesting a screening service.

Creating a Phase

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

Configuration > [Recruiting] Administration > Selections > Large Selections tab > Custom tab

Steps
1. In the Custom tab, click the elements link located on the same row as the service for which you are creating a phase.
2. Select New.
3. Complete the fields.
4. Click Done.

Result
A new phase is now available in the drop down list under phase in the CSW Action section of the service.

Next Step
Adding an invitation phase to a requisition.
Social Sourcing Integration in the Taleo Enterprise Suite

Taleo Enterprise provides an easy access to Taleo Social Sourcing product which is used to promote and manage employee referrals using social media.

When Taleo Social Sourcing product is enabled, the Social Sourcing link appears in the Welcome Center, under the Quick Access section, as well as in the core navigation bar via the Home icon.

Single Sign-On is available so Taleo users can seamlessly access Social Sourcing without having to provide a username and password.

Configuration

The Social Sourcing product is available in the Products Configuration list under SmartOrg. To enable Social Sourcing, contact Oracle Support.

Permissions have been created to use the Social Sourcing product.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Social Sourcing</td>
<td>This permission determines if a user can access the Social Sourcing product via the Welcome Center and the Home icon. A user having the Access Social Sourcing permission will be granted the Recruiter role in the Social Sourcing product.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; Users &gt; User Types &gt; Recruiting &gt; Sourcing</td>
</tr>
<tr>
<td>User Type Permission</td>
<td>Description</td>
<td>Location</td>
</tr>
<tr>
<td>---------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Manage Social Sourcing</td>
<td>This permission determines if a user can access the Social Sourcing product via the Welcome Center and the Home icon. A user having the Access Social Sourcing permission and the Manage Social Sourcing permission will be granted the Administrator role in the Social Sourcing product. Note that if you grant the Manage Social Sourcing permission to a user, you must also grant the Access Social Sourcing permission.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; Users &gt; User Types &gt; Recruiting &gt; Sourcing</td>
</tr>
</tbody>
</table>
Exportable Statuses

- Integration Service to Export Candidate Submissions..........................649
- Creating an Exportable Status.............................................................650
- Deleting an Exportable Status............................................................651
Integration Service to Export Candidate Submissions

An integration service allows customers to only export candidate submissions having reached a specific step and status in the candidate selection workflow (CSW).

This integration service is configurable via a feature called Exportable Statuses which is available in the Recruiting Administration menu, under Integration. The integration service is only available via a Bulk API.

Taleo customers have different points in time where they need to export candidate submissions to an external system (such as an HRIS). For example, when candidates have reached the Offer step or when candidates are hired. With the Exportable Statuses feature, system administrators have the ability to specify at which workflow/step/status combination candidate submissions are ready to be exported. When the external system makes an export query to Taleo, only candidate submissions having reached the specified combination within the given timeframe will be exported. Combinations are assigned to an external system, making it possible to export candidate submissions to different systems, at a different workflow/step/status combination. Multiple combinations can be set for the same external system.

Recommended Practices

- Because the integration service queries the candidate submissions’ History table (which can be demanding for the system), it is recommended not to configure an exportable status on a step/status combination that could define huge volumes of candidates as ready to be exported. For example, it is recommended not to set up an exportable status for the New-New step/status combination.
- Step/status combinations defined as exportable statuses should be set as mandatory in the CSW configuration to increase their usage by recruiters.
Creating an Exportable Status

Prerequisite

The Access integration service configuration permission is required to create exportable statuses
(Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Administration).

Steps

1. Click Create.
2. Provide a name for the external system.
   The external system name can contain alpha characters (a to z, A to Z), numeric characters (0 to 9),
   underscores, and hyphens. It cannot contain spaces. This name will need to be specified in the integration
   script when asking for an export.
3. Select a workflow, a step and a status.
4. Click Save.

Result

The exportable status appears in the list. When candidate submissions reach the specified combination, the
external system makes an export query to Taleo, which will only export candidate submissions having reached
the specified combination.

In the list of exportable statuses, invalid combinations are identified in red. For example, if an exportable
status is defined on a status that no longer exists, this exportable status will be displayed in red.

The integration service looks in the candidate submissions history and only exports submissions having
reached the configured workflow/step/status combination within the given time frame. Submissions are
exported even if they are not currently at the workflow/step/status; they only need to have reached it at some
point in the given time frame.

Every change to an exportable status is recorded in the History section, making it possible to determine what
was the configuration at a given point in time.
Deleting an Exportable Status

Prerequisite
The Access integration service configuration permission is required to delete exportable statuses (Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Administration).

Configuration > [Recruiting] Administration > Integration > Exportable Statuses

Steps
Click Remove next to an exportable status.

Result
As soon as an exportable status is removed from the list, the export service will no longer export candidate submissions having reached the workflow/step/status combination.

Every change to an exportable status is recorded in the History section, making it possible to determine what was the configuration at a given point in time.
Data Archiving and Deletion

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Automated Tasks

Automated Task

An automated task is an action the system automatically performs to delete and archive information contained in the database.

The Automated Tasks feature allows the deletion of the following data from the database:

- candidates
- requisitions
- requisition templates
- questions

Since Feature Pack 13A, the Automated Task feature no longer supports the deletion of history events. This functionality has been replaced by similar automatic tasks defined within the system. For details, see History Events Retention Period Before Deletion.

The Automated Task feature provides three types of deletion:

- **Permanently delete:** This type of deletion removes data from the database without the possibility of restoring it. This action can be performed on candidate files, requisition files, requisition templates, and questions. System administrators, when creating a task, can limit the task's scope to files that meet specific criteria. They can also specify when the task is to start and indicate whether the task is to be run on a recurring basis.

- **Delete (all data can later be restored):** This action is available for candidate files only. When using this type of deletion, candidate files deleted no longer appear in the Recruiting Center, but the files are not actually purged from the database. System administrators can restore a particular candidate file, several candidate files, or even all candidate files deleted by an iteration of the task if necessary. System administrators, when creating a task, can limit the task's scope to files that meet specific criteria. They can also specify when the task is to start and indicate whether the task is to be run on a recurring basis. Reports can include candidate files deleted in this manner. If the candidates referred other candidates, such references are deleted and cannot be restored afterward even if the candidate files are later restored.

- **Delete (non identifying data can later be used for reporting purposes):** This action is available for candidate files only. This type of deletion removes identifying data from the database with the possibility of retaining non identifying information for reporting purposes. Candidate files deleted in this manner cannot be restored afterward. If the candidates referred other candidates, such references are deleted and cannot be restored afterward.

Candidate file permanent deletions are performed in two stage deletions. The first stage is set to mark candidates to be erased (setting EntityStatusNo=2) and the second stage will actually delete the candidates. Note that the first and second stages cannot occur the same night. Therefore, hard-deleting a single candidate will take as long as hard-deleting 1000 files.

Questions used in requisitions cannot be deleted manually nor through the Automated Task feature. Users can delete obsolete and unreferenced questions only after cleaning up the question library, that is:

- Delete candidates (which will delete the answers associated to questions).
- Delete requisitions and templates.

When a candidate is deleted, it is as if the candidate never existed from a user point of view. Therefore, if a candidate applies for a second time, the candidate would need to create a whole new candidate file. The old file would not be available (unless the system administrator would have reactivated it).
Note that candidates who were involved in any Taleo Transitions process that has not been deleted first in Taleo Transitions will not be deleted. Taleo Transitions has its own automated task to delete older completed and canceled processes. If that task is run and no processes associated with a candidate remain, then the candidate can be deleted afterward using one of the Taleo Recruiting deletion methods.

Candidate deletions are done in batches of 1000 per hour. This means that a maximum of 12,000 candidates are processed per evening. Requisition deletions are done in batches of 100 per hour. This means that a maximum of 1200 requisitions are processed per evening.

System administrators can schedule automated tasks to be run automatically, once or on a recurring basis, or they can run them manually. Automated tasks run from 7:00 PM to 7:00 AM (Eastern Time) during the week, and full-time (24 hours a day) during the weekend.

History events of an automated task are kept 24 months in the system (Recruiting Administration > Automated Tasks > click an automated task > View History).

Configuration

To access this feature, users must be granted the Access Automated Tasks permission.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Automated Tasks</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Administration</td>
</tr>
</tbody>
</table>

Default Automated Tasks (System Tasks)

Default automated tasks have been created by Taleo and cannot be deleted.

Items deleted from the candidate search results (system task)

This task is triggered when users perform candidate searches and then delete candidate files. The task deletes the candidate files but the latter can later be restored if necessary (provided the files have not been deleted permanently in the interim by another task). To view and restore some or all of the candidate files deleted, system administrators can click the name of the task and click View History.

Restored items not permanently deleted (system task)

System administrators can trigger this task when they want to restore some or all of the items deleted by a task of type “Delete candidate files (all data can later be restored)” (provided the files have not been deleted permanently in the interim by another task). To do so, systems administrators click the name of the task. All items that have been deleted (as opposed to those that have been permanently deleted) are displayed.

Permanently delete candidate files deleted in the Staffing WebTop at least 7 days ago (system task)

This task is used to manually delete candidates from search results (candidate files can later be restored). System administrators can review who has been deleted, they can restore the candidate if the candidate decides otherwise or if the user made a mistake, they can also decide to deactivate the hard delete task and keep those candidates in the database for longer.

Automated Tasks and OFCCP

The purpose of the OFCCP feature, within the context of candidate searches, is to keep a record of the search results whenever a user performs a search for candidates for a requisition.

When a user performs a search for candidates for a specific requisition, a log file that contains the candidates retrieved by the search is created. Once the candidate is entered in the log, the candidate entry cannot be deleted for two years. Such log files can be indispensable if the organization has to undergo an audit.
If you create and run a task to delete ("all data can later be restored" or "nonidentifying data can later be used for reporting purposes") candidate files, future candidate searches will not retrieve the deleted candidate files even if the candidates are recorded in OFCCP logs. If you create a task to permanently delete candidate files, candidate files associated with candidates entered in OFCCP logs will be deleted but not permanently deleted (in compliance with OFCP). Consequently, future candidate searches files will not retrieve the deleted candidate files but the data contained in the OFCCP logs will be maintained.

Creating an Automated Task to Delete Candidates

Prerequisite

The Automated Task feature must be activated by Oracle Support.

The Access Automated Tasks user type permission is required.

Candidates included in the processing of an automated task must not be locked by the OFCCP feature.

Configuration > Recruiting Administration > Automated Tasks

Steps

1. Click New Task...
2. Select the Candidates option and click Next
3. Select the type of delete you want to perform.
   - Delete (all data can later be restored): Removes data from the database but provides the ability to restore it should the need arise.
   - Delete (non identifying data can later be used for reporting purposes): Removes identifying data from the database with the possibility of retaining non identifying information for reporting purposes. Deleted data cannot be restored afterward.
   - Permanently delete: Removes data from the database without the possibility of restoring it.
4. Select criteria to refine the deletion process. See Deleting Candidates Criteria.
5. Type the name and code of the task.
6. Select the task status:
   - If you want the task to be activated when it is created, select Active.
   - If you do not want the task to run when it is created, select Inactive. A task whose status is Inactive will not run regardless of its execution date or recurrence.
7. To indicate the day on which you want the task to start running, make a selection using the calendar icon in the Task Execution Date section.
8. Specify the recurrence of the task:
   - If you do not want the task to be run on a regular basis, select No.
   - If you want the task to be run regularly, select Yes then select a frequency from the list.
9. Click Next.
10. If the summary information is correct, click Finish.

The Summary page contains a section generated by the system: Count. This section indicates the number of candidate files that would be deleted if the task's status was Active and the task was run at that moment. This information can be useful when evaluating the load that the system will likely incur when the task is run. It is recommended that you click the link in the Count section to view the list of candidate files that would be deleted. By studying the list of candidate files, you can determine whether the task targets the ones you want it to delete.
Result

The automated task appears in the Automated Tasks page.

Deleting Candidates Criteria

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include candidate files whose “Creation Date” is older than:</td>
<td>Select the criterion if you want the task to process candidate files that were created earlier than a specific period immediately prior to the moment the task is executed. If you select this criterion, you must also specify the time period by making a selection from the corresponding list. Suppose, for example, that you selected 6 months and that the task was executed on August 31st. The task would process candidate files whose “Creation Date” was March 1st or earlier, and satisfied all the other criteria you might have selected.</td>
</tr>
<tr>
<td>Include candidate files whose “Candidate File Last Update” has not changed in the last:</td>
<td>Select the criterion if you want the task to process candidate files that were not modified during a specific period of time prior to the moment the task is executed. If you select this criterion, you must also select the time period by making a selection from the corresponding list. Suppose, for example, that you selected 6 months and that the task was executed on August 31st. The task would process candidate files whose “Candidate File Last Update” date was earlier than March 1st, and satisfied all the other criteria you might have selected. To consult the list of changes that trigger an update to the Candidate File Last Update, see <em>Events that Trigger Updates to Candidate File Last Update and Last Activity Date</em>.</td>
</tr>
<tr>
<td>Include candidate files whose “Last Activity Date” has not changed in the last:</td>
<td>Select the criterion if you want the task to process candidate files whose Last Activity Date has not changed during a specific period of time prior to the moment the task is executed. If you select this criterion, you must also select the time period by making a selection from the corresponding list. Suppose, for example, that you selected 6 months and that the task was executed on August 31st. The task would process candidate files whose Last Activity Update date was earlier than March 1st, and satisfied all the other criteria you might have selected. To consult the list of changes that trigger an update to the Last Activity Date, see <em>Events that Trigger Updates to Candidate File Last Update and Last Activity Date</em>.</td>
</tr>
<tr>
<td>Include candidate files that were deleted X days ago or before:</td>
<td>Select the criterion if you want the task to process candidate files that were deleted on a specific day (relative to the day the task will be executed) or earlier but are restorable (i.e., were not deleted permanently). If you select this criterion, you must also enter the number of days. Suppose, for example, that you selected this criterion and then entered 7. If the task was executed on the 21st of the month the task would process candidate files that were deleted – but are restorable – on the 14th of the month or earlier, and satisfied all the other criteria you might have selected.</td>
</tr>
</tbody>
</table>
| Include candidates who have no completed profile or application.         | Select the criterion if you want the task to process candidate files of candidates who have not completed any career section flow (profiler or job-specific application), and satisfy all the other criteria you might have selected. The following candidates, even if they have not completed any career section flow as such, are considered to have “completed applications” and thus will not be deleted permanently by the task:  
  • Candidates who are matched to a requisition.  
  • Candidates who are entered in the system by way of the Capture Resume or the import toolkit.  
  • Candidates who are hired. |
<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include candidate files marked as “Identification Missing”.</td>
<td>Select the criterion if you want the task to process candidate files that have been identified as “Identification Missing”, and satisfy all the other criteria you might have selected. Candidates provided no identification (first name, last name, initial), and did not indicate that they wished to be anonymous.</td>
</tr>
<tr>
<td>Include candidates who are not currently active in a selection process.</td>
<td>Select the criterion if you want the task to process candidate files of candidates who are not currently part of a selection process on an “active” requisition, and satisfy all the other criteria you might have selected. An “active” requisition is one that has not been rejected, marked as “has declined”, deleted, cancelled, or filled. For example, the task would not delete permanently a candidate who was at the Background Check step in a selection process on an “active” requisition.</td>
</tr>
<tr>
<td>Include candidates who have not applied on any requisition in the last:</td>
<td>Select the criterion if you want the task to process candidate files of candidates who have not applied on any requisition during a specific period of time prior to the moment the task is executed. If you select this criterion, you must also select the time period by making a selection from the corresponding list. Suppose, for example, that you selected 6 months and that the task was executed on August 31st. The task would process candidate files of candidates who had not applied on any requisition from March 1st to August 31st.</td>
</tr>
<tr>
<td>Include candidates who were referred by an agent X ago or earlier.</td>
<td>Select the criterion if you want the task to process candidate files of candidates who were referred by an agent at a point in time or earlier, and satisfy all the other criteria you might have selected. The task will delete candidates whose first General Profile has an agent in the Source field. Note that the Source field can be updated in the Recruiting Center. This criterion uses the current value of the field to determine whether a candidate is to be deleted.</td>
</tr>
<tr>
<td>Include candidates whose “Place of Residence” is one of the following locations:</td>
<td>Select the criterion if you want the task to process candidate files of candidates who have a particular place of residence, and satisfy all the other criteria you might have selected. Click Add… to add locations. If you add a location and then wish to remove it from the list, click the Remove icon that corresponds to the location. If you wish to remove all the locations you added, click Remove All.</td>
</tr>
<tr>
<td>Include candidates who have applied on a requisition whose “Primary Location” is one of the following:</td>
<td>Select the criterion if you want the task to process candidate files of candidates who submitted a job-specific application for a requisition that specifies a particular primary location, and that satisfy all the other criteria you might have selected. You could use this criterion, for example, to delete permanently candidate files of candidates who indicated they wanted to work in a particular country but lived in another country. Click Add… to add locations. If you add a location and then wish to remove it from the list, click the Remove icon that corresponds to the location. If you wish to remove all the locations you added, click Remove All.</td>
</tr>
<tr>
<td>Include candidates who have been referred by an agent or agency at least this long ago.</td>
<td>Select the criterion if you want the task to process candidates who have been referred by an agent or agency at least this long ago.</td>
</tr>
<tr>
<td>Include only candidates who have been deleted.</td>
<td>Select the criterion if you want the task to only process candidates who have been deleted.</td>
</tr>
<tr>
<td>Exclude candidate files that were deleted in the last:</td>
<td>Select the criterion if you want the task to exclude candidate files that were deleted in a specific period of time.</td>
</tr>
<tr>
<td>Exclude internal candidates.</td>
<td>Select the criterion if you do not want the task to process candidate files of internal candidates.</td>
</tr>
</tbody>
</table>
| Exclude candidate files whose status is “Hired” on a requisition. | Select the criterion if you want to exclude from the task candidate files of candidates whose status is “Hired” on at least one requisition. In other words, they are currently employed by the organization. To avoid deleting permanently employees who have been hired outside of the system (and who consequently do
<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exclude candidates who have applied on a requisition whose “Primary Location” is one of the following:</td>
<td>Select the criterion if you want to exclude from the task candidate files of candidates who submitted a job-specific application for a requisition that specifies a particular primary location, and that satisfy all the other criteria you might have selected. You could use this criterion, for example, to prevent candidate files of candidates who indicated they wanted to work in a particular country but lived in another country from being deleted. This criterion can be used in conjunction with the two previous criteria to gain greater control when deleting candidates in keeping with a specific country’s regulations. Click Add… to add locations. If you add a location and then wish to remove it from the list, click the Remove icon that corresponds to the location. If you wish to remove all the locations you added, click Remove All.</td>
</tr>
<tr>
<td>Exclude candidates who are currently active in a selection process.</td>
<td>Select the criterion if you do not want the task to process candidates who are currently active in a selection process.</td>
</tr>
<tr>
<td>Exclude referrers.</td>
<td>Select the criterion if you do not want the task to process referrers.</td>
</tr>
</tbody>
</table>

**Candidate Identifying Information**

The following “identifying” information is deleted and cannot be restored when using the deletion action "Delete candidate files (nonidentifying data can later be used for reporting purposes)":

- First name
- Last name
- Initial
- Address line 1
- Address line 2
- City
- Zip code
- Phone numbers (all)
- Email address
- Web site
- Employee number
- Social security number (or Government ID)
- Values before change, kept in the Tracking History for Contact Information Updated events
- Date of birth
- Place of residence (Country, State/Province and Region)
- User-defined fields
- Reference by an agent or another candidate
- Cover letter
- Pasted resume
- Additional information
- Career objective
- Attached file masked fields
Events that Trigger Updates to “Candidate File Last Update” and “Last Activity Date”

Whenever certain events (actions) occur, the “Candidate File Last Update” and the “Last Activity Date” are updated. Except where otherwise noted, the following events trigger an update to both the “Candidate File Last Update” and the “Last Activity Date”.

<table>
<thead>
<tr>
<th>Career Section Actions</th>
<th>Recruiting Center Actions – General Actions</th>
<th>Candidate Progression is a Selection Process:</th>
<th>Edits to the Candidate File</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Forgot Password Link</td>
<td>• Attach or Delete a File on the Tracking or Resume Tabs</td>
<td>• Change Status – only the “Last Activity Date” is updated</td>
<td>• Update any value on the Prescreening, Resume, or Profile Tabs</td>
</tr>
<tr>
<td>• Change Password</td>
<td>• Match to a Requisition – only the “Last Activity Date” is updated</td>
<td>• Move – only the “Last Activity Date” is updated</td>
<td>• Update any answer on the Regulations Tab</td>
</tr>
<tr>
<td>• Update Basic Profile</td>
<td>• Generate New Password</td>
<td>• Bypass – only the “Last Activity Date” is updated</td>
<td>• Add or Change Referring Agent on the Tracking Tab</td>
</tr>
<tr>
<td>• Update Personal Information (including UDFs)</td>
<td>• Unlock Account</td>
<td>• Revert – only the “Last Activity Date” is updated</td>
<td></td>
</tr>
<tr>
<td>• Update Skill Answers</td>
<td>• Add Referrer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Update Question Answers</td>
<td>• Remove Referrer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Update Disqualification Question Answers</td>
<td>• Delete Candidate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Update Additional Information (Pasted Resume, Pasted Cover Letter, etc.)</td>
<td>• Restore Candidate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Create, Delete or Update Studies (including UDFs)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Create, Delete or Update Work Experiences (including UDFs)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Update EEO answers (USA/Canada)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Attach or Remove a File</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Update the “Accept invitations by email…” check mark</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Creating an Automated Task to Permanently Delete Requisitions

Prerequisite

The Automated Task feature must be activated by Oracle Support.

The Access Automated Tasks user type permission is required.
Requisitions included in the processing of an automated task must not be linked to any candidates.

**Configuration > [Recruiting] Administration > Automated Tasks**

**Steps**
1. Click *New Task...*
2. Select the *Requisitions* option and click *Next*
3. The *Permanently delete* option is selected, click *Next*.
4. Select criteria to refine the deletion process. See *Deleting Requisitions Criteria*.
5. Type the name and code of the task.
6. Select the task status:
   - If you want the task to be activated when it is created, select Active.
   - If you do not want the task to run when it is created, select Inactive. A task whose status is Inactive will not run regardless of its execution date or recurrence.
7. To indicate the day on which you want the task to start running, make a selection using the calendar icon in the *Task Execution Date* section.
8. Specify the recurrence of the task:
   - If you do not want the task to be run on a regular basis, select No.
   - If you want the task to be run regularly, select Yes then select a frequency from the list.
9. Click *Next*.
10. If the summary information is correct, click *Finish*.

The “Summary” step contains a section generated by the system: Count. This section indicates the number of requisitions that would be deleted permanently if the task’s status was Active and the task was run at that moment. This information can be useful when evaluating the load that the system will likely incur when the task is run. It is recommended that you click the link in the Count section to view the list of requisitions that would be deleted. By studying the list of requisitions, you can determine whether the task targets the requisitions you want it to delete permanently.

**Result**

The automated task appears in the Automated Tasks page.

The automated task will permanently delete requisitions, leaving no trace of their existence in the Taleo database apart from the database ID, requisition number, requisition title, and creation date of each requisition, which are displayed on the history page of each iteration of the task (see *Viewing the History of an Automated Task*).

### Deleting Requisitions Criteria

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include requisitions whose “Requisition Number” starts with:</td>
<td>Select this criterion if you want the task to process requisitions whose requisition number starts with a particular series of characters and/or numbers, and satisfy all the other criteria you might have selected. Enter the beginning of the requisition number(s) in the field. For example, if you wanted to delete permanently all requisitions whose requisition number started with “REQ-Finance-001-”, you would enter REQ-Finance-001- in the field.</td>
</tr>
<tr>
<td>Include requisitions whose “Title” starts with:</td>
<td>Select this criterion if you want the task to process requisitions whose title starts with a particular series of characters and/or numbers, and satisfy all the other criteria you might have selected. Enter the beginning of the title(s) in the field. For example, if you wanted to delete permanently all requisitions whose title started with “FE-class II”, you would enter FE-class II in the field.</td>
</tr>
<tr>
<td>Criteria</td>
<td>Description</td>
</tr>
<tr>
<td>----------</td>
<td>-------------</td>
</tr>
<tr>
<td>Include requisitions whose “Creation Date” is older than:</td>
<td>Select this criterion if you want the task to process requisitions that were created earlier than a specific period of time immediately prior to the moment the task is executed. If you select this criterion, you must also specify the time period by making a selection from the corresponding list. Suppose, for example, that you selected 6 months and that the task was executed on August 31st. The task would process requisitions whose “Creation Date” was March 1st or earlier, and satisfied all the other criteria you might have selected.</td>
</tr>
<tr>
<td>Include requisitions whose “Last Modification Date” is older than:</td>
<td>Select this criterion if you want the task to process requisitions that were not modified during a specific period of time immediately prior to the moment the task is executed. If you select this criterion, you must also select the time period by making a selection from the corresponding list. Suppose, for example, that you selected 6 months and that the task was executed on August 31st. The task would process requisitions whose “Last Modification Date” was unchanged from March 1st to August 31st, and satisfied all the other criteria you might have selected.</td>
</tr>
<tr>
<td>Include requisitions whose “Status” is:</td>
<td>Select this criterion if you want the task to process requisitions that have a particular status, and satisfy all the other criteria you might have selected. It is recommended that you select from the list Filled, Canceled, or Deleted (though it is possible to select one of the other statuses).</td>
</tr>
<tr>
<td>Include requisitions whose “Primary Location” is one of the following:</td>
<td>Select this criterion if you want the task to process requisitions that specify a particular Primary Location, and satisfy all the other criteria you might have selected. Click Add… to add locations. If you add a location and then wish to remove it from the list, click the Remove icon that corresponds to the location. If you wish to remove all the locations you added, click Remove All.</td>
</tr>
<tr>
<td>Include requisitions whose “Organization” is one of the following:</td>
<td>Select this criterion if you want the task to process requisitions that specify a particular Organization, and satisfy all the other criteria you might have selected. Click Add… to add organizations. If you add an organization and then wish to remove it from the list, click the Remove icon that corresponds to the organization. If you wish to remove all the organizations you added, click Remove All.</td>
</tr>
<tr>
<td>Include requisitions whose “Job” is one of the following:</td>
<td>Select this criterion if you want the task to process requisitions that specify a particular Job, and satisfy all the other criteria you might have selected. Click Add… to add jobs. If you add a job and then wish to remove it from the list, click the Remove icon that corresponds to the job. If you wish to remove all the jobs you added, click Remove All.</td>
</tr>
</tbody>
</table>

Creating an Automated Task to Permanently Delete Requisition Templates

**Prerequisite**

The Automated Task feature must be activated by Oracle Support.

The [Access Automated Tasks](#) user type permission is required.

**Configuration > [Recruiting] Administration > Automated Tasks**

**Steps**

1. Click New Task...
2. Select the Templates option and click Next
3. The Permanently delete option is selected, click Next.
4. Select criteria to refine the deletion process. See Deleting Templates Criteria.
5. Type the name and code of the task.

6. Select the task status:
   • If you want the task to be activated when it is created, select Active.
   • If you do not want the task to run when it is created, select Inactive. A task whose status is Inactive will not run regardless of its execution date or recurrence.

7. To indicate the day on which you want the task to start running, make a selection using the calendar icon in the Task Execution Date section.

8. Specify the recurrence of the task:
   • If you do not want the task to be run on a regular basis, select No.
   • If you want the task to be run regularly, select Yes then select a frequency from the list.

9. Click Next.

10. If the summary information is correct, click Finish.

    The “Summary” step contains a section generated by the system: Count. This section indicates the number of templates that would be deleted permanently if the task’s status was Active and the task was run at that moment. This information can be useful when evaluating the load that the system will likely incur when the task is run. It is recommended that you click the link in the Count section to view the list of templates that would be deleted. By studying the list of templates, you can determine whether the task targets the templates you want it to delete permanently.

Result

The automated task appears in the Automated Tasks page.

The automated task will permanently delete requisition templates, leaving no trace of their existence in the Taleo database apart from each template’s database ID, job code, template title, and creation date, which are displayed on the history page of each iteration of the task. (see Viewing the History of an Automated Task).

Deleting Templates Criteria

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include templates whose “Job Code” starts with:</td>
<td>Select this criterion if you want the task to process templates whose job code starts with a particular series of characters and/or numbers, and satisfy all the other criteria you might have selected. Enter the beginning of the job code(s) in the field. For example, if you wanted to delete permanently all templates whose job code started with “Templ-Finance-001-”, you would enter Templ-Finance-001- in the field.</td>
</tr>
<tr>
<td>Include templates whose “Title” starts with:</td>
<td>Select this criterion if you want the task to process templates whose title starts with a particular series of characters and/or numbers, and satisfy all the other criteria you might have selected. Enter the beginning of the title(s) in the field. For example, if you wanted to delete permanently all templates whose title started with “FE-class II”, you would enter FE-class II in the field.</td>
</tr>
<tr>
<td>Include templates whose “Creation Date” is older than:</td>
<td>Select this criterion if you want the task to process templates that were created earlier than a specific period of time immediately prior to the moment the task is executed. If you select this criterion, you must also specify the time period by making a selection from the corresponding list. Suppose, for example, that you selected 6 months and that the task was executed on August 31st. The task would process templates whose “Creation Date” was March 1st or earlier, and satisfied all the other criteria you might have selected.</td>
</tr>
<tr>
<td>Include templates whose “Last Modification Date” is older than:</td>
<td>Select this criterion if you want the task to process templates that were not modified during a specific period of time immediately prior to the moment the task is executed. If you select this criterion, you must also specify the time period by making a selection from the corresponding list. Suppose, for example, that you selected 6 months and that the task was executed on August 31st. The task would process templates whose “Last Modification Date” was March 1st or earlier, and satisfied all the other criteria you might have selected.</td>
</tr>
</tbody>
</table>
### Criteria

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include templates whose “Status” is:</td>
<td>Select this criterion if you want the task to process templates that have a particular Status, and satisfy all the other criteria you might have selected.</td>
</tr>
<tr>
<td>Include templates whose “Primary Location” is one of the following:</td>
<td>Select this criterion if you want the task to process templates that specify a particular Primary Location, and satisfy all the other criteria you might have selected. Click Add… to add locations. If you add a location and then wish to remove it from the list, click the Remove icon that corresponds to the location. If you wish to remove all the locations you added, click Remove All.</td>
</tr>
<tr>
<td>Include templates whose “Organization” is one of the following:</td>
<td>Select this criterion if you want the task to process templates that specify a particular Organization, and satisfy all the other criteria you might have selected. Click Add… to add organizations. If you add an organization and then wish to remove it from the list, click the Remove icon that corresponds to the organization. If you wish to remove all the organizations you added, click Remove All.</td>
</tr>
<tr>
<td>Include templates whose “Job” is one of the following:</td>
<td>Select this criterion if you want the task to process templates that specify a particular Job, and satisfy all the other criteria you might have selected. Click Add… to add jobs. If you add a job and then wish to remove it from the list, click the Remove icon that corresponds to the job. If you wish to remove all the jobs you added, click Remove All.</td>
</tr>
</tbody>
</table>

---

### Creating an Automated Task to Permanently Delete Questions

**Prerequisite**

The Automated Task feature must be activated by Oracle Support.

The Access Automated Tasks user type permission is required.

**Configuration > [Recruiting] Administration > Automated Tasks**

**Steps**

1. Click **New Task...**
2. Select the **Questions** option and click **Next**
3. The **Permanently delete** option is selected, click **Next**.
4. Select criteria to refine the deletion process. See **Deleting Questions Criteria**.
5. Type the name and code of the task.
6. Select the task status:
   - If you want the task to be activated when it is created, select Active.
   - If you do not want the task to run when it is created, select Inactive. A task whose status is Inactive will not run regardless of its execution date or recurrence.
7. To indicate the day on which you want the task to start running, make a selection using the calendar icon in the **Task Execution Date** section.
8. Specify the recurrence of the task:
   - If you do not want the task to be run on a regular basis, select No.
   - If you want the task to be run regularly, select Yes then select a frequency from the list.
9. Click Next.
10. If the summary information is correct, click Finish.

The “Summary” step contains a section generated by the system: Count. This section indicates the number of questions that would be deleted permanently if the task's status was Active and the task was run at that moment. This information can be useful when evaluating the load that the system will likely incur when the task is run. It is recommended that you click the link in the Count section to view the list of questions that would be deleted. By studying the list of templates, you can determine whether the task targets the questions you want it to delete permanently.

Result

The automated task appears in the Automated Tasks page.

The automated task will permanently delete questions, leaving no trace of their existence in the Taleo database apart from each question’s database ID, question, and creation date, which are displayed on the history page of each iteration of the task (see Viewing the History of an Automated Task).

Deleting Questions Criteria

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include questions whose “Creation Date” is older than:</td>
<td>Select this criterion if you want the task to process questions that were created earlier than a specific period of time immediately prior to the moment the task is executed. If you select this criterion, you must also specify the time period by making a selection from the corresponding list. Suppose, for example, that you selected 6 months and that the task was executed on August 31st. The task would process questions whose “Creation Date” was March 1st or earlier, and satisfied all the other criteria you might have selected.</td>
</tr>
<tr>
<td>Include questions whose “Last Modification Date” is older than:</td>
<td>Select this criterion if you want the task to process questions that were not modified during a specific period of time immediately prior to the moment the task is executed. If you select this criterion, you must also select the time period by making a selection from the corresponding list. Suppose, for example, that you selected 6 months and that the task was executed on August 31st. The task would process questions whose “Last Modification Date” was unchanged from March 1st to August 31st, and satisfied all the other criteria you might have selected.</td>
</tr>
<tr>
<td>Include questions whose “Type” is:</td>
<td>Select this criterion if you want the task to process questions of a particular type, and satisfy all the other criteria you might have selected. If you select this criterion, you must also specify the type of question (Prescreening or Disqualification) by making a selection from the corresponding list.</td>
</tr>
<tr>
<td>Include questions whose “Status” is:</td>
<td>Select this criterion if you want the task to process questions that have a particular Status, and satisfy all the other criteria you might have selected. If you select this criterion, you must also specify the Status (Active, Inactive, or Obsolete) by making a selection from the corresponding list.</td>
</tr>
</tbody>
</table>

Viewing the History of an Automated Task

Prerequisite

The Automated Task feature must be activated by Oracle Support.

The Access Automated Tasks user type permission is required.

Configuration > [Recruiting] Administration > Automated Tasks
Steps

1. Click the task whose history you want to view.
2. In the Overview section, click View History.

Result

A new page is displayed that includes “historical” information about each past and current iteration of the task: the day and time that each iteration started and ended, the length of time during which the task ran, the name of the person or the system that initiated the iteration, the iteration's current status, the number of items processed, and the number of errors.
Product Resources

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Product Resources

Resource Administration

The Resource Administration feature allows system administrators to display the ID associated to text appearing on pages of Taleo applications in order to modify the text.

Each element of text also called resource, such as fields, buttons, tooltips, links, page titles and sections, has a unique ID associated to it. These IDs can be displayed in the application, in front of each resource, so users can precisely locate and identify a resource they need to modify or override in the application. If an “X” appears at the right of the resource ID, this means that the text was already overridden.

The value of a resource can be composed of units, special characters, and letters. The resource value is not unique, therefore the same text can be used for different resources. Resource values can be modified and updated in the application by system administrators. To make a global change to the value of a resource for all zones, contact your Oracle representative.

Example: The Save button can be used on several pages of the application. Each Save button appearing in the application will have a specific ID, and the value of every Save button will be text Save.

Resource values can be refreshed. This enables system administrators to apply any changes made to the resource values for the customer’s custom set of resources. System administrators can block the refresh of the resource value. This allows system administrators to use a testing environment where the actual value of a resource is either chosen or not. This is usually done while performing some temporary testing in a staging zone.

With the exception of the Onboarding New Hire Portal, each Taleo product has a specific Resource Administration feature allowing the display of the product’s resource IDs. The New Hire Portal Resource Administration is accessed from this URL: http://yourzonename/newhireportal/ResourceConsole.js.

<table>
<thead>
<tr>
<th>Product</th>
<th>Administration Menu</th>
</tr>
</thead>
<tbody>
<tr>
<td>Career Section Administration</td>
<td>Career Section Administration Menu</td>
</tr>
<tr>
<td>Career Section</td>
<td>Career Section Administration Menu</td>
</tr>
<tr>
<td>Central Configuration</td>
<td>SmartOrg Administration Menu</td>
</tr>
<tr>
<td>Onboarding Administration</td>
<td>Onboarding Administration Menu</td>
</tr>
<tr>
<td>Onboarding WebTop</td>
<td>Onboarding Administration Menu</td>
</tr>
<tr>
<td>Transitions Administration</td>
<td>Transitions Administration Menu</td>
</tr>
<tr>
<td>Transitions Center</td>
<td>Transitions Administration Menu</td>
</tr>
<tr>
<td>Performance Administration</td>
<td>Performance Administration Menu</td>
</tr>
<tr>
<td>Performance</td>
<td>Performance Administration Menu</td>
</tr>
<tr>
<td>Recruiting Administration</td>
<td>Recruiting Administration Menu</td>
</tr>
<tr>
<td>Recruiting Center</td>
<td>Recruiting Administration Menu</td>
</tr>
<tr>
<td>SmartOrg</td>
<td>SmartOrg Administration Menu</td>
</tr>
</tbody>
</table>
### Manage resources

Provides users the ability to refresh resource values, to block resource value refresh, and to force the refresh of resource values.

**Location:**
- Configuration > [SmartOrg] Administration > User Types > Functional Domains > Configuration > Resource Management

### Display resource identifiers

Provides users the ability to display resource IDs using the Show Identifier button in the Resource Administration page.

**Location:**
- Configuration > [SmartOrg] Administration > User Types > Functional Domains > Configuration > Resource Management

---

To modify resource values for a specific product, user type permissions specific to the product are also required in some cases. To modify Taleo Transitions resource values, for example, users require the permissions described in the previous table and at least one Transitions permission, for example, "Manage Transitions processes of all types".

### Displaying Resource Identifiers

**Prerequisite**
The Display Resource Identifiers user type permission is required.

**Configuration** > [Product] Administration > Resource Administration

**Steps**
1. Click Show Identifiers.
2. Close this window.

**Result**
Starting with the next page that is displayed, resource IDs will be displayed in front of each element of the application.

---

### Hiding Resource Identifiers

**Prerequisite**
Resource Identifiers must be displayed.

The Display Resource Identifiers user type permission is required.

**Configuration** > [Product] Administration > Resource Administration

**Steps**
1. Click Hide Identifiers.
2. Close this window.

**Result**
Starting with the next page that is loaded, resource IDs will no longer be displayed in front of each element of the application.
Refreshing Resource Values

**Prerequisite**
Two user type permissions are required: Manage Resources and Display Resource Identifiers.

*Configuration > [Product] Administration > Resource Administration*

**Steps**
1. Click Unblock Refresh.
2. Select the desired type of refresh.
3. Enter the name of the project if necessary.
   The project name is associated with revisions made to the customer's custom set of resource values, administered in Taleo's TexTool application.
4. Click Refresh Values.
5. Close the window.

**Result**
The latest value of the resources is displayed.

Blocking Resource Value Refresh

**Prerequisite**
Two user type permissions are required: Manage Resources and Display Resource Identifiers.

*Configuration > [Product] Administration > Resource Administration*

**Steps**
1. Click Block Refresh.
2. Add a comment.
3. Click Save.
4. Close the window.

**Result**
It will no longer be possible to have the application reflect any changes applied to a value.

Unblocking Resource Value Refresh

**Prerequisite**
Two user type permissions are required: Manage Resources and Display Resource Identifiers.

*Configuration > [Product] Administration > Resource Administration*

**Steps**
1. Click Unblock Refresh.
2. Close the window.

**Result**
Any changes applied to resource values will be reflected in the application when refreshing the values.
Next Step

Refresh resource values.