PeopleSoft®

PeopleSoft Enterprise Talent Acquisition Manager 8.9 PeopleBook

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About This PeopleBook Preface

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements, such as fields and check boxes, that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

You might also want to complete at least one PeopleSoft introductory training course, if applicable.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft menus, and pages, forms, or windows. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft applications.

Note. Application fundamentals PeopleBooks are not applicable to the PeopleTools product.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most PeopleSoft product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across one or more product lines. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection website, access the PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact MMA Partners at 877 588 2525.

Email

Send email to MMA Partners at peoplebookspress@mmapartner.com.

See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

Additional Resources

The following resources are located on the PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Pre-built Integrations for PeopleSoft Enterprise and PeopleSoft EnterpriseOne Applications
Minimum technical requirements (MTRs) (EnterpriseOne only)	Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms
PeopleBook documentation updates	Support, Documentation, Documentation Updates
PeopleSoft support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Prerelease Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes

Resource	Navigation
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.

Typographical Convention or Visual Cue	Description
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

If the note is preceded by *Important!,* the note is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Cross-References

PeopleBooks provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: "(FRA) Hiring an Employee"

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements Used in PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
Once, Always, and **Don't Run**	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Request ID	An ID that represents a set of selection criteria for a report or process.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.
User ID	An ID that represents the person who generates a transaction.

PeopleSoft Enterprise Talent Acquisition Manager Preface

This preface discusses:

- PeopleSoft products.
- PeopleSoft Enterprise HRMS Application Fundamentals.
- PeopleBook structure.

PeopleSoft Products

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

PeopleSoft Enterprise HRMS Application Fundamentals

Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook.* Each PeopleSoft product line has its own version of this documentation.

Note. One or more pages in PeopleSoft Enterprise Talent Acquisition Manager operate in deferred processing mode. Deferred processing is described in the preface in the *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook.*

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook

PeopleBook Structure

PeopleSoft PeopleBooks follow a common structure. By understanding this structure, you can use this PeopleBook more efficiently.

The PeopleBooks structure conveys a task-based hierarchy of information. Each chapter describes a process that is required to set up or use the application. Chapter sections describe each task in the process. Subsections within a section describe a single step in the process task.

Some PeopleBooks may also be divided into parts. PeopleBook parts can group together similar implementation or business process chapters within an application or group together two or more applications that integrate into one overall business solution. When a book is divided into parts, each part is divided into chapters.

The following table provides the order and descriptions of chapters in a PeopleBook

Chapters	Description
Preface	This is the chapter you're reading now. It explains: • How to use the Application Fundamentals book. • How PeopleBooks are structured. • Common elements used in the PeopleBook, if necessary.
Getting Started With…	This chapter discusses product implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the product and other products. • A high-level documentation to how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.
Navigation	(Optional) Some PeopleSoft applications provide custom navigation pages that contain groupings of folders that support a specific business process, task, or user role. When an application contains custom navigation pages, this chapter provides basic navigation information for these pages. **Note.** Not all applications have delivered custom navigation pages.
Understanding…	(Optional) This is an introductory chapter that broadly explains the product and the functionality within the product.
Setup and Implementation	This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the product. For example, if functionality X is part of a product, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality. **Note.** There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.

Chapters	Description
Business Process	This can be one or more chapters. These chapters contain documentation that addresses specific business processes with each chapter generally devoted to a specific functional area. For example, if functionality X is part of a product, this chapter would be devoted to explain how the functionality works, not necessarily how to set up functionality X. You would look to the corresponding setup and implementation chapter to learn how to set up the functionality. **Note.** There may be times when a small amount of setup and implementation information is included in a business process chapter if the amount of setup and implementation documentation was insufficient to create a separate chapter in the book.
Appendixes	(Optional) If the book requires it, one or more appendixes might be included in the book. Appendixes contain information considered supplemental to the primary documentation.
Delivered Workflow Appendix	(Optional) The delivered workflow appendix describes all of the workflows that are delivered for the application. **Note.** Not all applications have delivered workflows.
Reports Appendix	(Optional) This appendix contains an abbreviated list of all of the product's reports. The detailed documentation on the use of these reports is usually included in the related business process chapter.

CHAPTER 1

Getting Started with Talent Acquisition Manager

This chapter discusses:

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

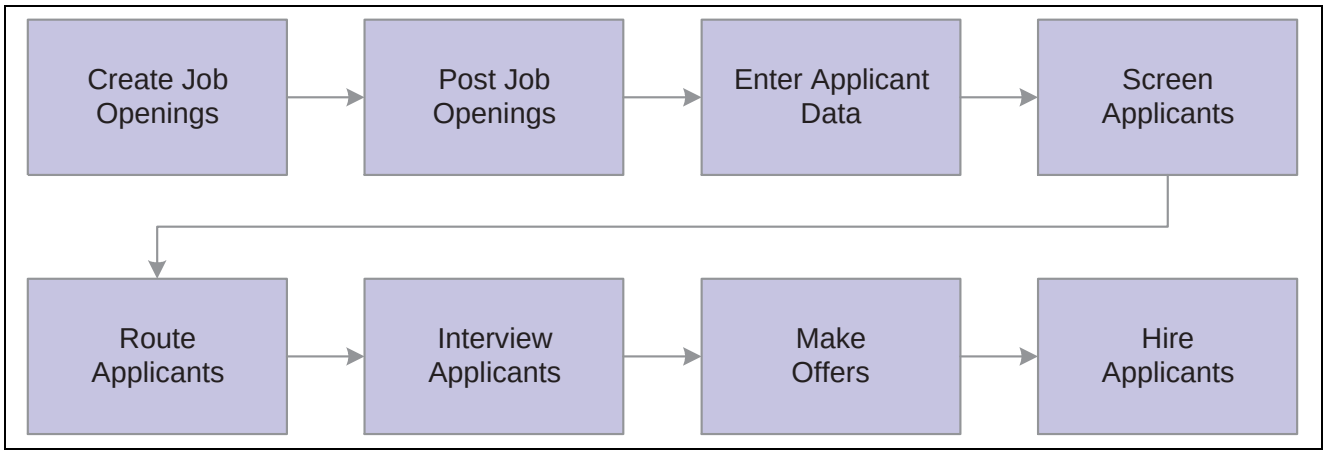
Talent Acquisition Manager Overview

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

With this application, you can:

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

This diagram outlines the business process flow for the Talent Acquisition Manager recruitment process:



Business process flow for the Talent Acquisition Manager recruitment process

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

- Create and manage employee referral programs.
- Use the text catalog to modify much of the text that appears on the applicant facing pages.

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

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

  See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Working with Common Components," Setting Up the Text Catalog.
- Secure access to data.

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

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

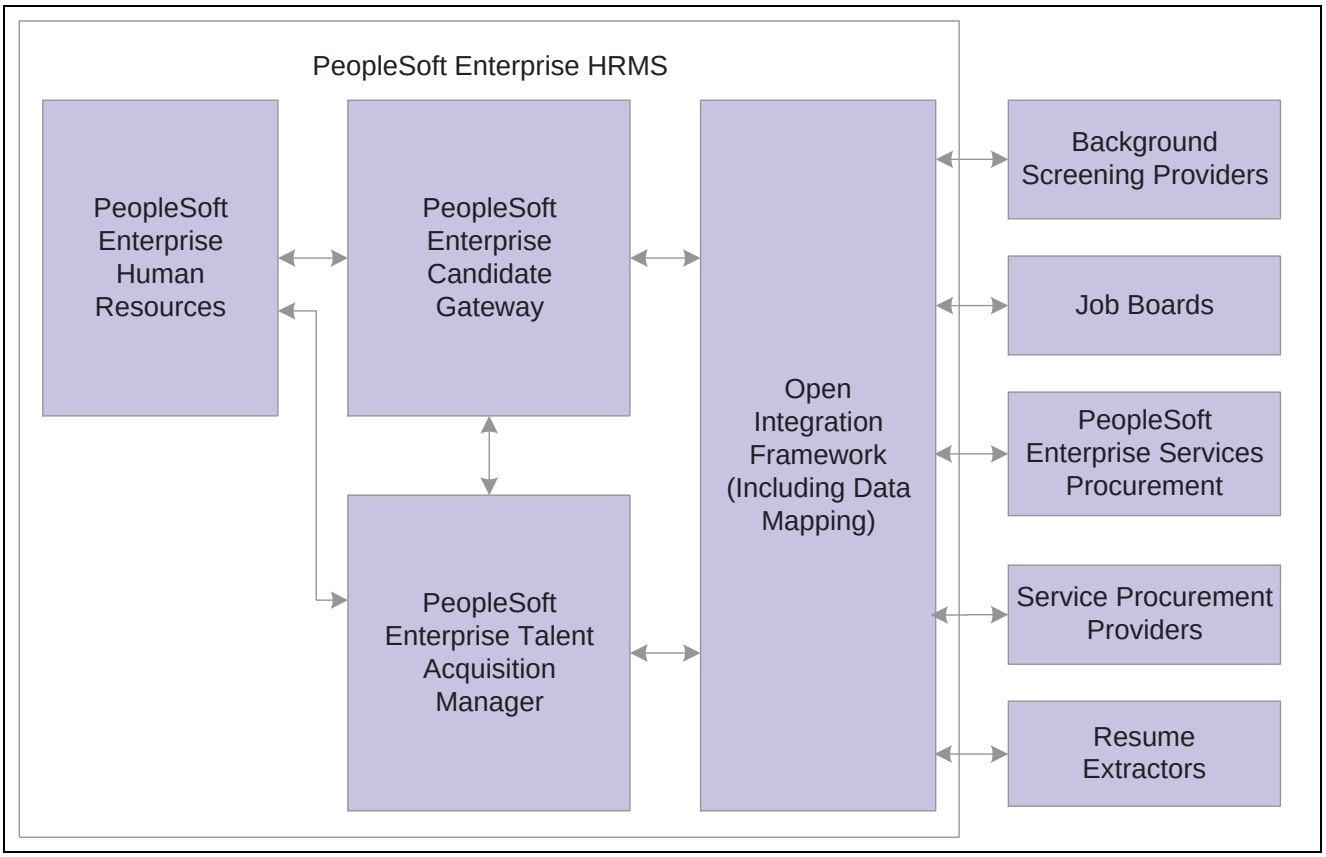
  To accommodate people that might need to approve job openings or job offers that are outside the business unit, department, or company that is tied to a job opening, Talent Acquisition Manager uses the Recruiting Row Level Security component to give them access.

  See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up and Administering HRMS Security," Activating Additional Security for Recruiting Solutions.

  See Chapter 8, "Creating Job Openings," page 143.

Talent Acquisition Manager Integrations

Talent Acquisition Manager integrates with these PeopleSoft applications:



Talent Acquisition Manager integration

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

Supplemental information about third-party application integrations is located on the PeopleSoft Customer Connection website.

Talent Acquisition Manager Implementation

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

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

This tables lists all of the components that have component interfaces:

Component	Component Interface	References
HRS_QSTN_SET_DEF 2	HRS_QSTN_SET_DEF 2	See Chapter 2, "Setting Up the Recruiting Process," Setting Up Job Openings, page 11.
HRS_ QSTN_DEF	HRS_ QSTN_DEF	See Chapter 2, "Setting Up the Recruiting Process," Setting Up Job Openings, page 11.
HRS_LOCATION	HRS_LOCATION	See Chapter 2, "Setting Up the Recruiting Process," Setting Up Job Openings, page 11.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "PeopleSoft Enterprise HRMS 8.9 Application Fundamentals Preface"

PeopleSoft Enterprise Setup Manager for HRMS 8.9

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Component Interfaces

CHAPTER 2

Setting Up the Recruiting Process

This chapter discusses how to:

- Set up implementation defaults.
- Set up Talent Acquisition Manager implementation defaults.
- Set up job openings.
- Set up job postings.
- Set up applications.
- Set up applicant communications.
- Set up questionnaires.
- Set up applicant screening.
- Set up interview evaluations.
- Set up job offers.
- Set up the hiring process.

Setting Up Implementation Defaults

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

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

Page Used to Set Up Implementation Defaults

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

Selecting PeopleSoft Applications for Your Installation

Access the Products page.

See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up and Installing PeopleSoft HRMS," Selecting PeopleSoft Applications for Your Installation.

Setting Up Talent Acquisition Manager Implementation Defaults

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

This section discusses how to:

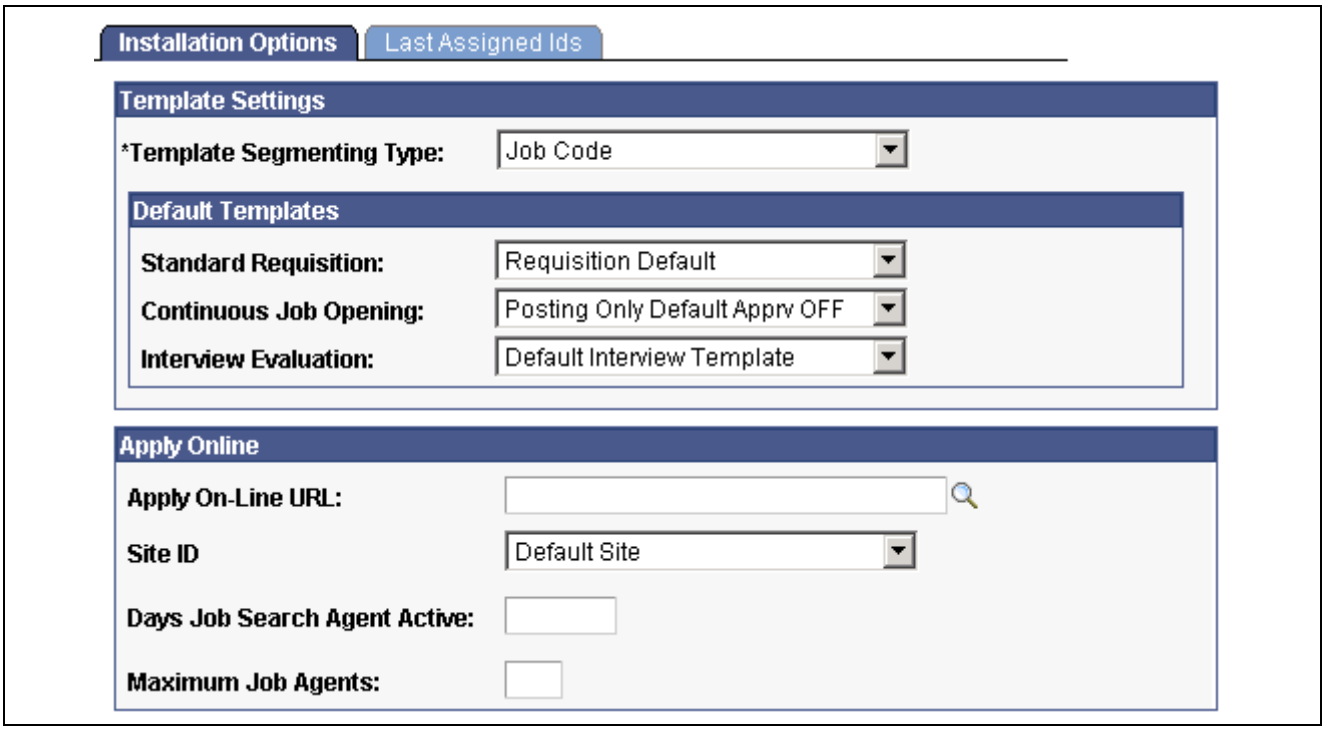
- Define recruiting installation defaults.
- Specify starting numbers for system-assigned numbers.

Pages Used to Set Up Talent Acquisition Manager Implementation Defaults

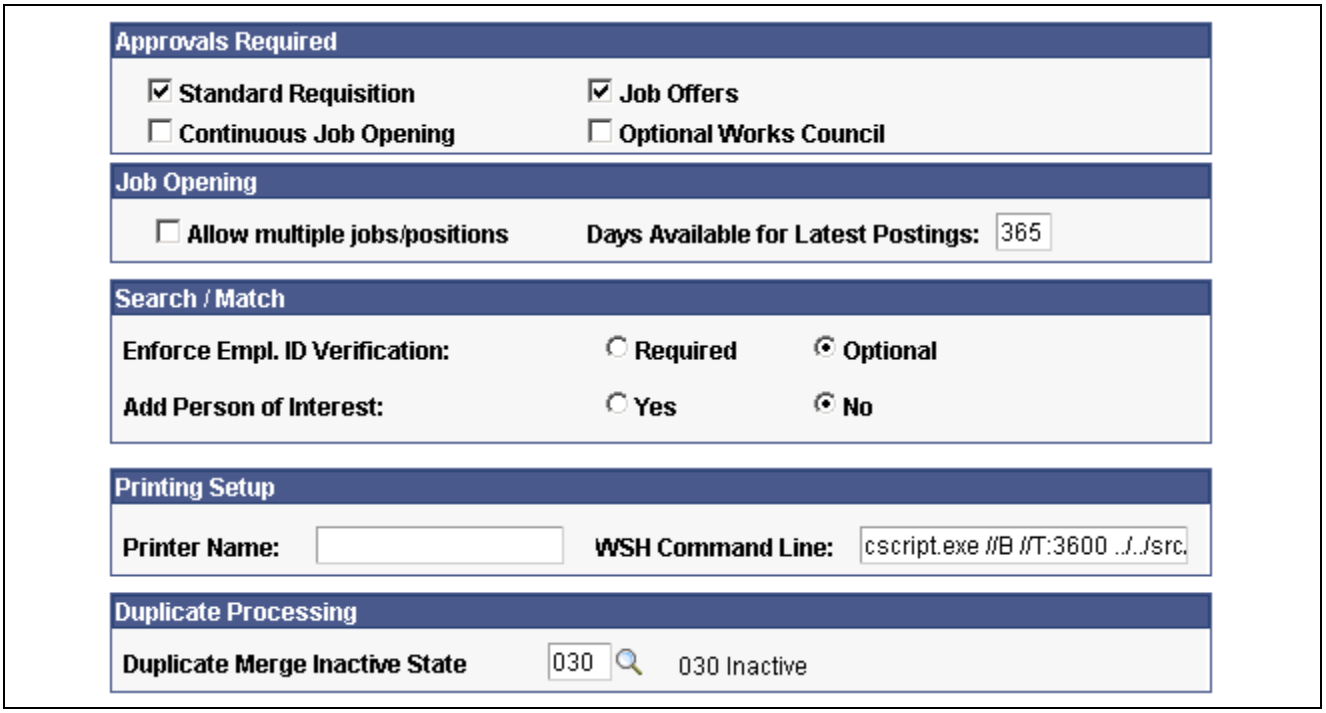
Page Name	Object Name	Navigation	Usage
Recruiting Installation - Installation Options	HRS_INST	Set Up HRMS, Install, Product and Country Specific, Recruiting Installation, Recruiting Installation - Installation Options	Define recruiting installation defaults.
Recruiting Installation - Last Assigned Ids	HRS_INST_CNTRS	Set Up HRMS, Install, Product and Country Specific, Recruiting Installation, Last Assigned Ids	Specify starting numbers for system-assigned numbers. These should be set to a number that does not overlap with existing values in the database or you will get duplicate value errors.

Defining Recruiting Installation Defaults

Access the Recruiting Installation - Installation Options page.



Recruiting Installation - Installation Options page (1 of 2)



Recruiting Installation - Installation Options page (2 of 2)

Template Settings

Template Segmenting Type (Optional) Select the segmenting type to be used to identify the recruitment template that is used by the Create New Job Opening (HRS_JO_LAUNCH) component. This also controls the fields that are displayed on the Enter Primary Job Opening Information page.

Values are:

- *<blank>*
- *Business Unit*
- *Company*
- *Department*
- *Job Code*
- *Job Family*
- *Job Profile*
- *Salary Grade*

Create recruitment templates by using the Recruitment Template page.

See Chapter 3, "Setting Up Recruiting Templates," Setting Up Recruitment Templates, page 50.

See Chapter 8, "Creating Job Openings," Creating Job Openings, page 144.

Default Templates

Standard Requisition Select the job opening template for a standard requisition that the system will use when creating a new job opening if no other template can be found that matches the segmentation scheme.

Continuous Job Opening Select the job opening template for a continuous job opening that the system will use when creating a new job opening if no other template can be found that matches the segmentation scheme.

Interview Evaluation Template Select the interview evaluation template that will be used when a job opening doesn't correspond to a segmented template.

Apply Online

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

Apply On-Line URL (apply online uniform resource locator) Select the URL identifier that points to the page on the organization's website where applicants can access the Careers Home page. The system includes this URL in emails that it sends to external applicants who have applied online. Applicants click the link in the email to access the Careers Home page, where they can perform various recruitment tasks that are related to the subject of the email.

Site ID Select a default site ID. The system uses the default site ID when it cannot determine a specific site. Define site IDs on the Site - Setup Site page.

Days Job Search Agent Active Enter the number of days that an applicant's job search agent is kept in the database. The maximum number of days that a profile can stay active is 999. This date is used by the Job Agent process to determine whether a profile is out of date and should be deleted. If you do not enter a value, the system keeps job agents in the database indefinitely.

Maximum Job Agents Enter the maximum number of job agents that an applicant can have. The default is five.

Approvals Required

Standard Requisition Select to use approvals when creating job openings with a type of standard requisition.

Continuous Job Opening Select to use approvals when creating job openings with a type of continuous job opening.

Job Offers Select to use approvals when creating a job offer.

Optional Works Council Select if you want to use approvals when using works council. When you select this option, the Works Council Information section appears as an option in the job opening template.

See Chapter 3, "Setting Up Recruiting Templates," Setting Up Job Opening Templates, page 40.

If you select this option, you must also select the Job Offers check box.

Job Opening

Allow Multiple Jobs/Positions Select if you want to allow multiple jobs or positions linked to one job opening.

Days Available for Latest Posting Enter the number of days that a job posting is available for display in the Results group box on the Find Jobs page.

Search/Match

Enforce Empl. ID Verification (enforce employee identification verification) Select whether it is Required or Optional that a recruiter search the HR database to determine whether an applicant was a previous employee, contingent worker, or person of interest for the company during the Prepare for Hire process.

Add Person of Interest Specify whether you want the system to search the HR database to determine whether an applicant was a previous employee, contingent worker, or person of interest for the company when you add an external applicant to the system as a person of interest by using the Add Person of Interest page.

Printing Setup

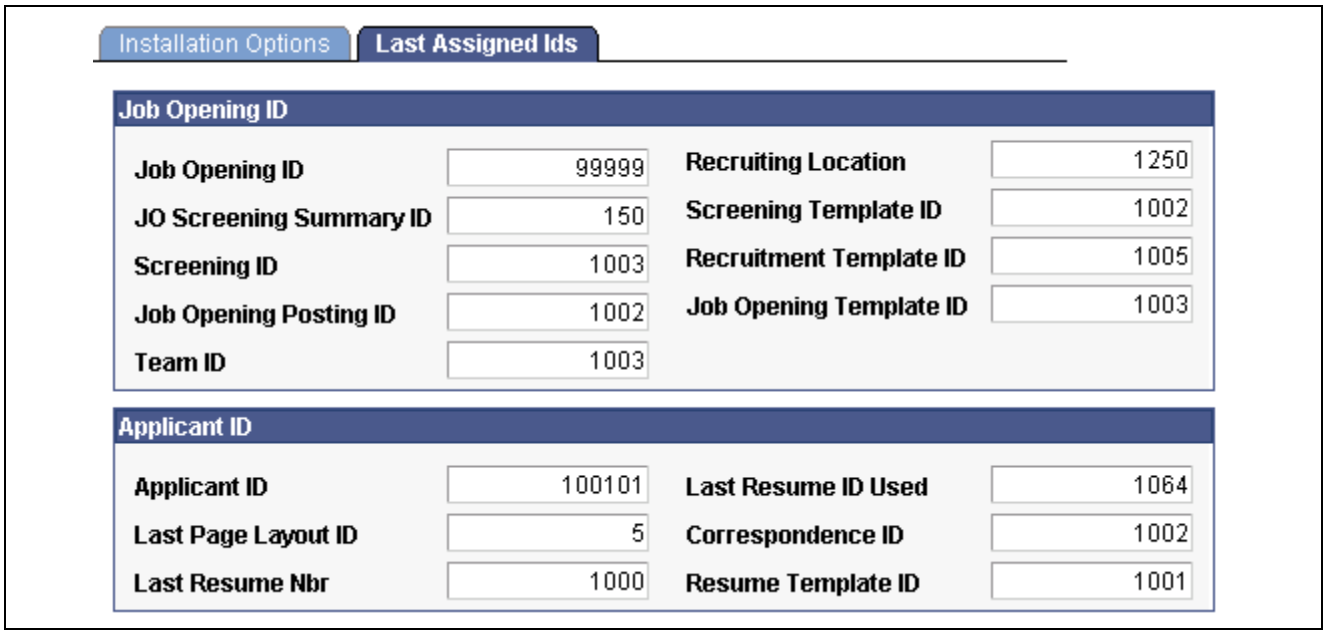
Printer Name Select the printer that the system will use when printing recruitment letters.

WSH Command Line (windows scripting host command line) If you want to print online, enter the fully qualified path location of the WSH executable along with the recruiting printing source code program as a parameter. For example: cscript.exe //B //T:3600 ../../src/vbs/HRS_WORD_ENGINE.WSF

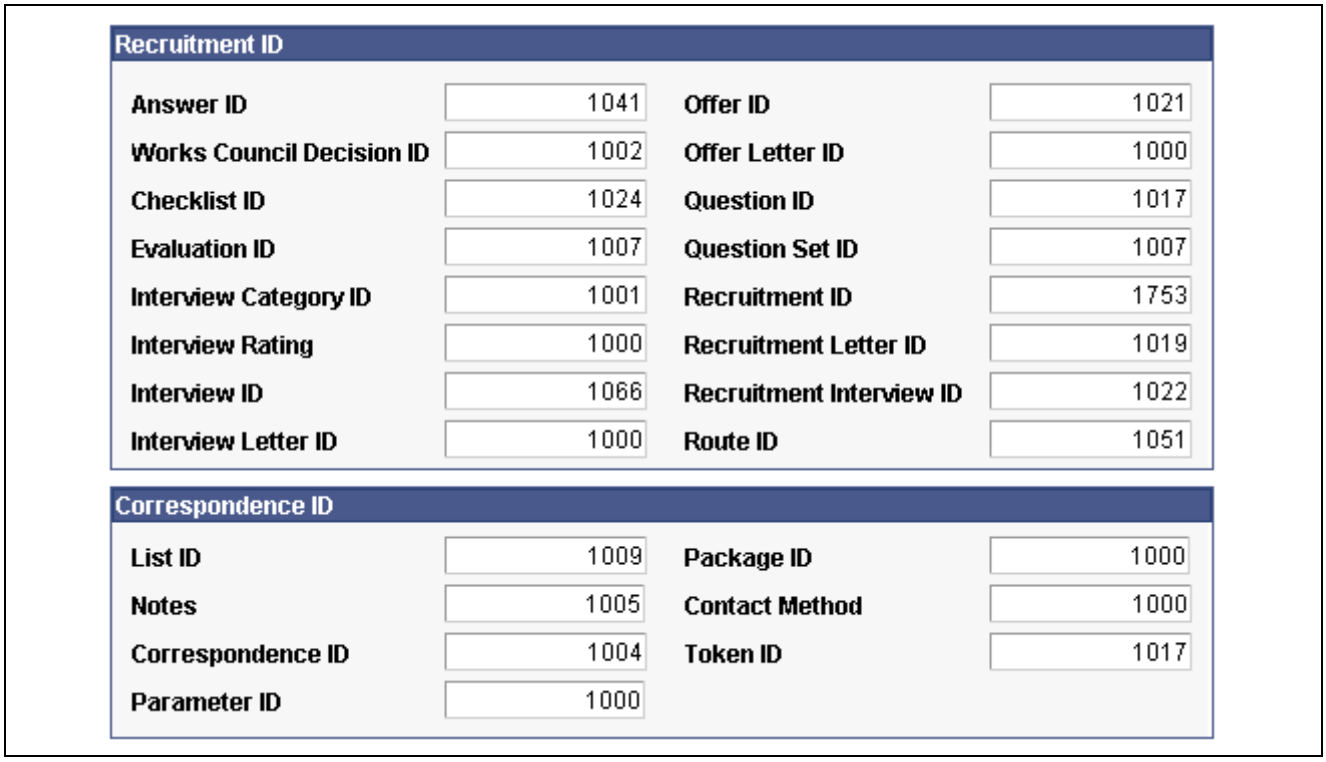
To print online, you are restricted to using a windows process scheduler.

Specifying Starting Numbers for System-Assigned Numbers

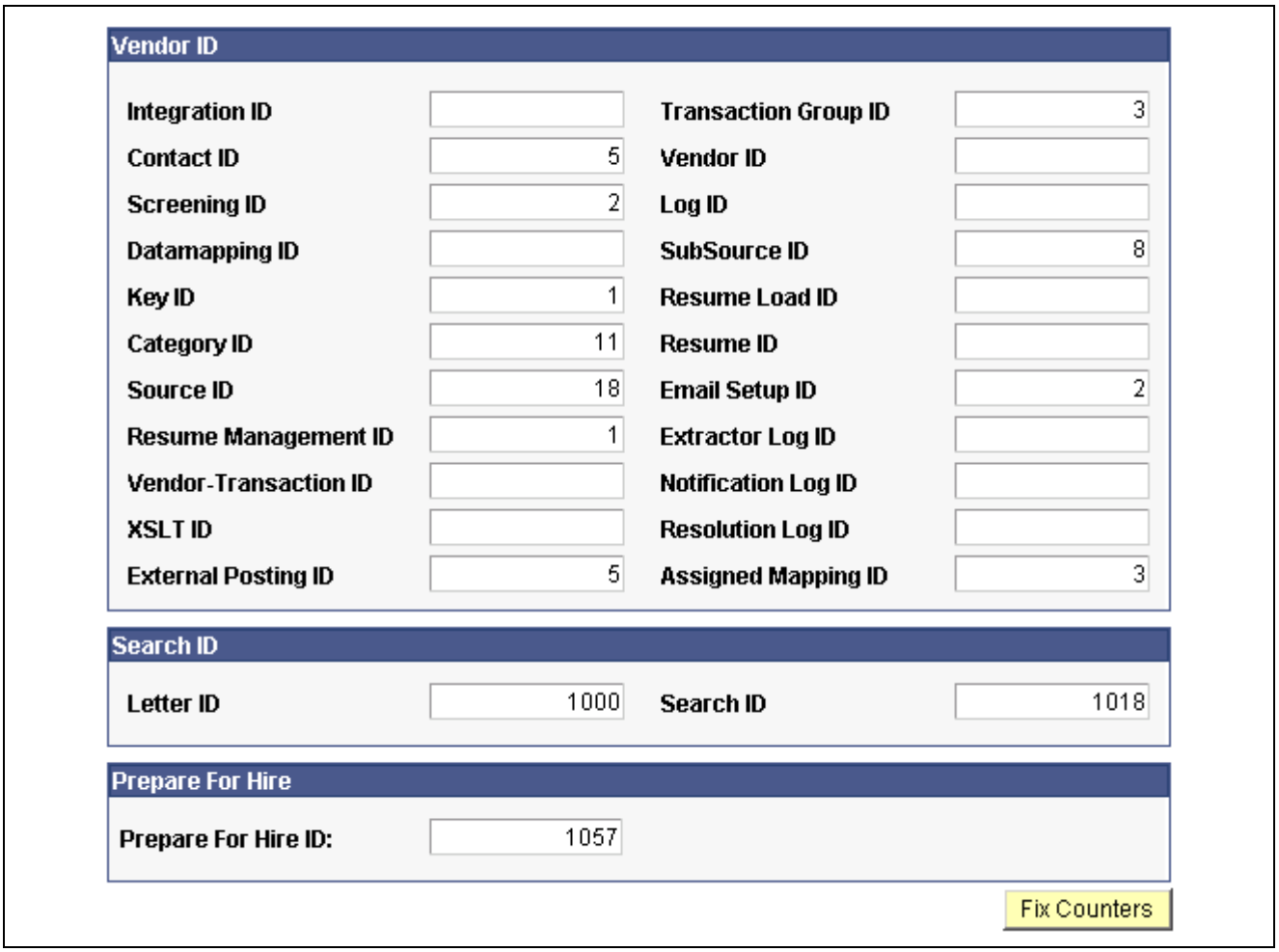
Access the Recruiting Installation - Last Assigned Ids page.



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



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



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

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

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

Setting Up Job Openings

To set up job openings, use the Recruiting Locations (HRS_LOCATION), Contacts (HRS_CONTACT), and Recruiter Roles (HRS_JO_RCTR_ROLE) components.

This section discusses how to:

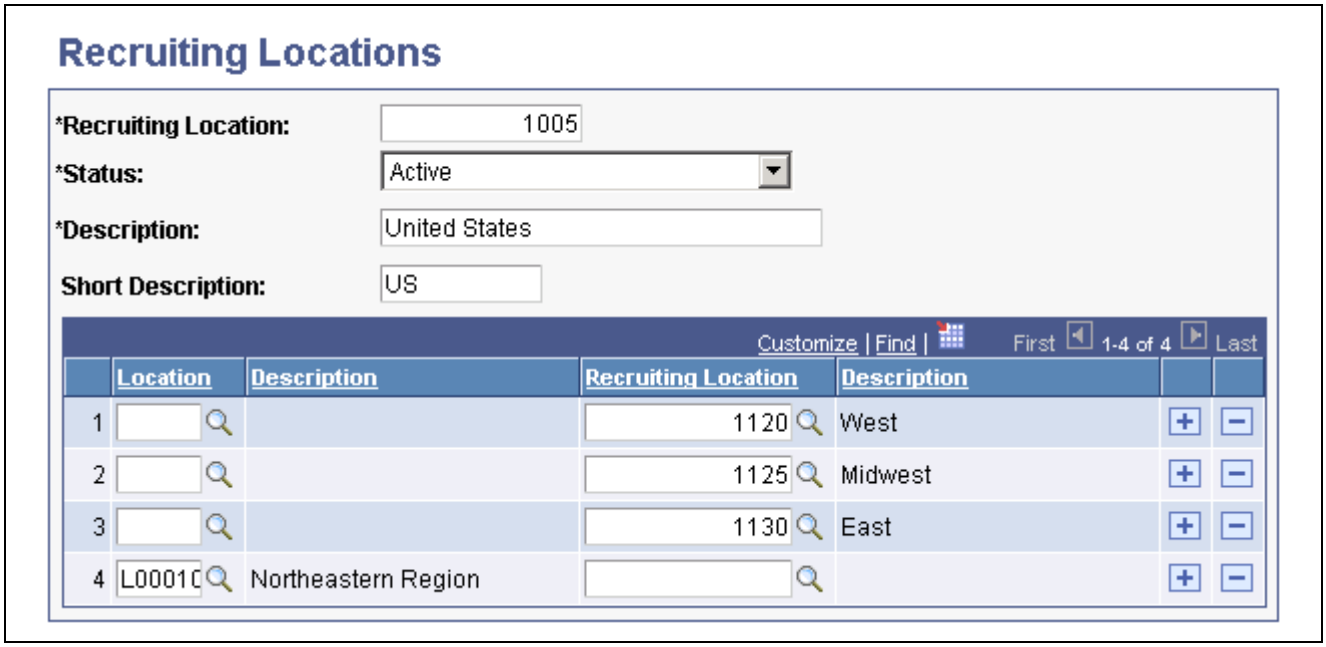
- Define recruiting locations.
- Define recruiter roles.

Pages Used to Set Up Job Openings

Page Name	Object Name	Navigation	Usage
Recruiting Locations	HRS_LOCATION	Set Up HRMS, Product Related, Recruiting, Recruiting Locations, Recruiting Locations	Define recruiting locations by grouping company locations into geographic units.
Recruiter Roles	HRS_JO_RCTR_ROLE	Set Up HRMS, Recruiting, Recruiter Roles, Recruiter Roles	Define recruiter roles.

Defining Recruiting Locations

Access the Recruiting Locations page.



Recruiting Locations page

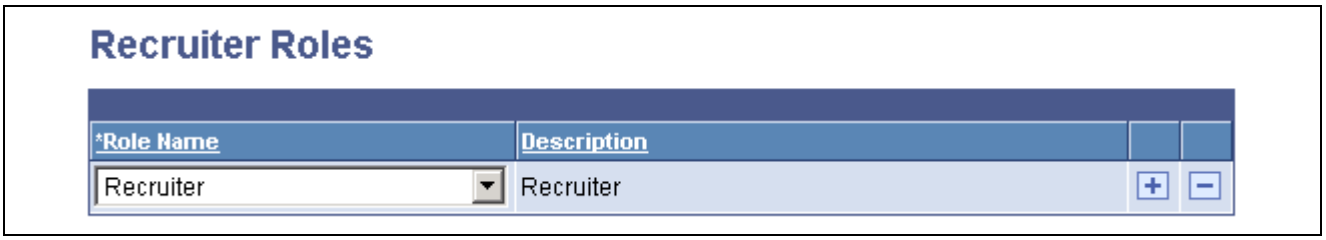
Recruiting locations are used by job searches to help narrow the location of a job opening. For example, if an applicant is only interested in finding jobs in a specific region, you can create a recruiting location for that particular region and assign it to the job opening. The job search looks at the recruiting location associated to that job opening, and if a match is found, it displays that job opening to the applicant.

Location Select a company location. Define company locations by using the Location (LOCATION_TABLE) component.

Recruiting Location Select a location that you want added to this recruiting location.

Defining Recruiter Roles

Access the Recruiter Roles page.



Recruiter Roles page

Recruiter Roles Select the roles that you want to be available when assigning a recruiter to a job opening in the Assignments group box on the Job Opening page. Only the IDs in these roles are available.

Setting Up Job Postings

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

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

- Define posting description types.
- Create posting descriptions.

Understanding Job Posting Setup

This section discusses:

- Posting descriptions.
- Posting descriptions library.

Posting Descriptions

A job posting is made up of a series of statements that provide a description of the job opening for potential applicants. These series of statements can be grouped into categories. For example, you may have a statement that:

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

PeopleSoft delivers the following statement categories or posting description types:

- B - Basis of Rating.
- C - Closing Statement.
- D - Department Marketing Statement.
- E - Equal Employment Opportunity.
- H - How to Apply.

- I - Other Information.
- L - Conditions of Employment.
- M - Major Duties.
- O - Organization Marketing Statement.
- P - Pay, Benefits, & Work Schedule.
- Q - Qualifications.
- R - Responsibilities.
- T - How CTAP &/or ICTAP May Apply.
- V - How to Claim Veterans Preference.
- W - Who May Apply.

Posting Descriptions Library

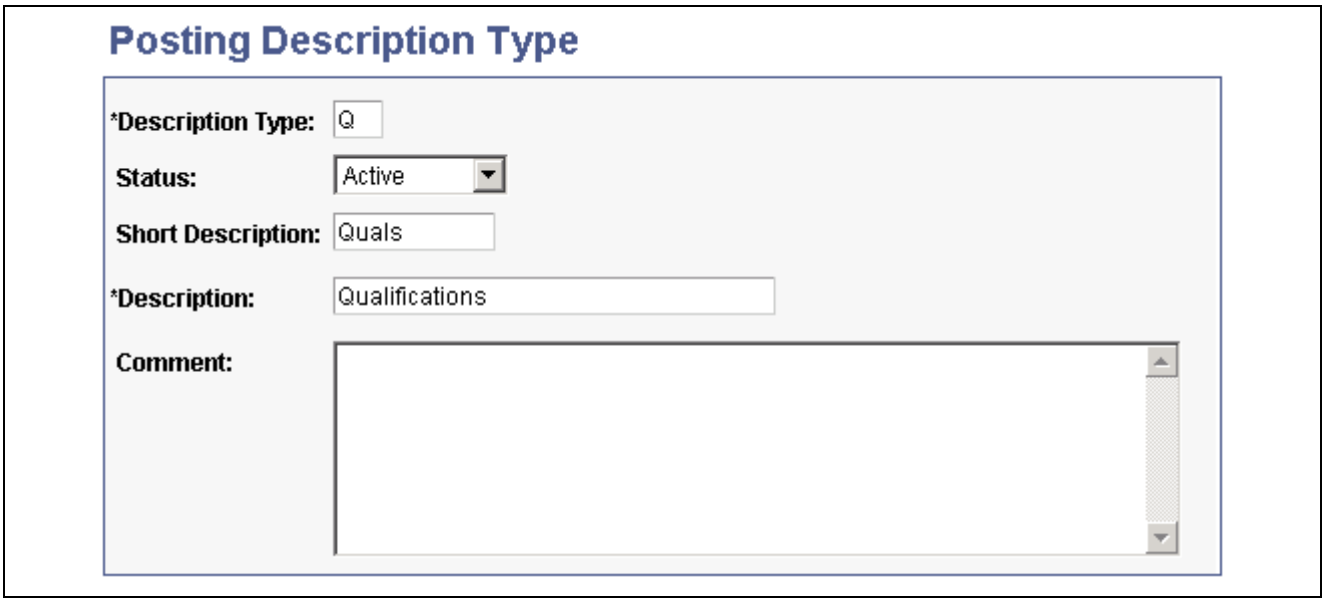
The posting descriptions library provides the content that will go into each of the posting description types. You can enter the content at the time you create a job opening, but using the posting description library enables you to standardized the content and help your organization provide some standardization between similar job postings.

Pages Used to Set Up Job Postings

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

Defining Posting Description Types

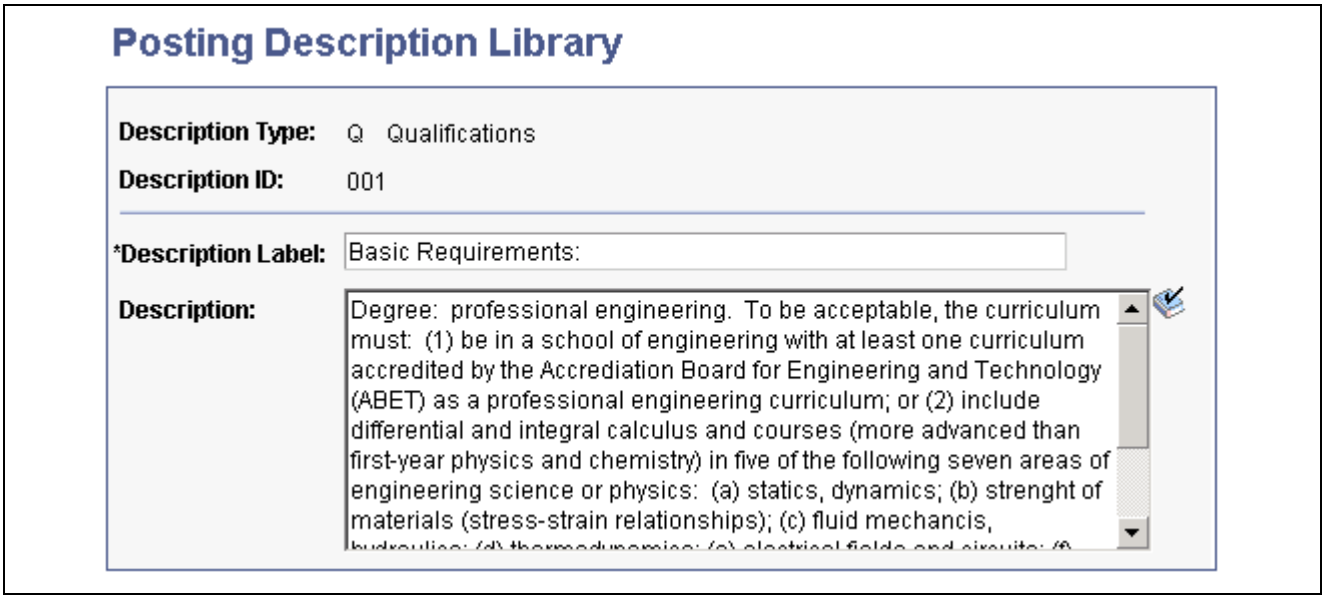
Access the Posting Description Type page.



Posting Description Type page

Creating Posting Descriptions

Access the Posting Description Library page.



Posting Description Library page

Description Label Enter the description that will be used as a section label in the job posting.

Description Enter text that describes the posting entry that you created. If this posting description is assigned to the job opening, it will print on the job posting.

Setting Up Applications

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

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

Understanding Attachment Types

Not only do applicants applying for jobs need to submit resumes, they may want to include cover letters or references. The Attachment Types component enables you to identify the types of documents that the system will accept from applicants, as well as set limits on the number of documents an applicant can submit. You also identify the directory where those documents are stored.

PeopleSoft delivers these attachment types:

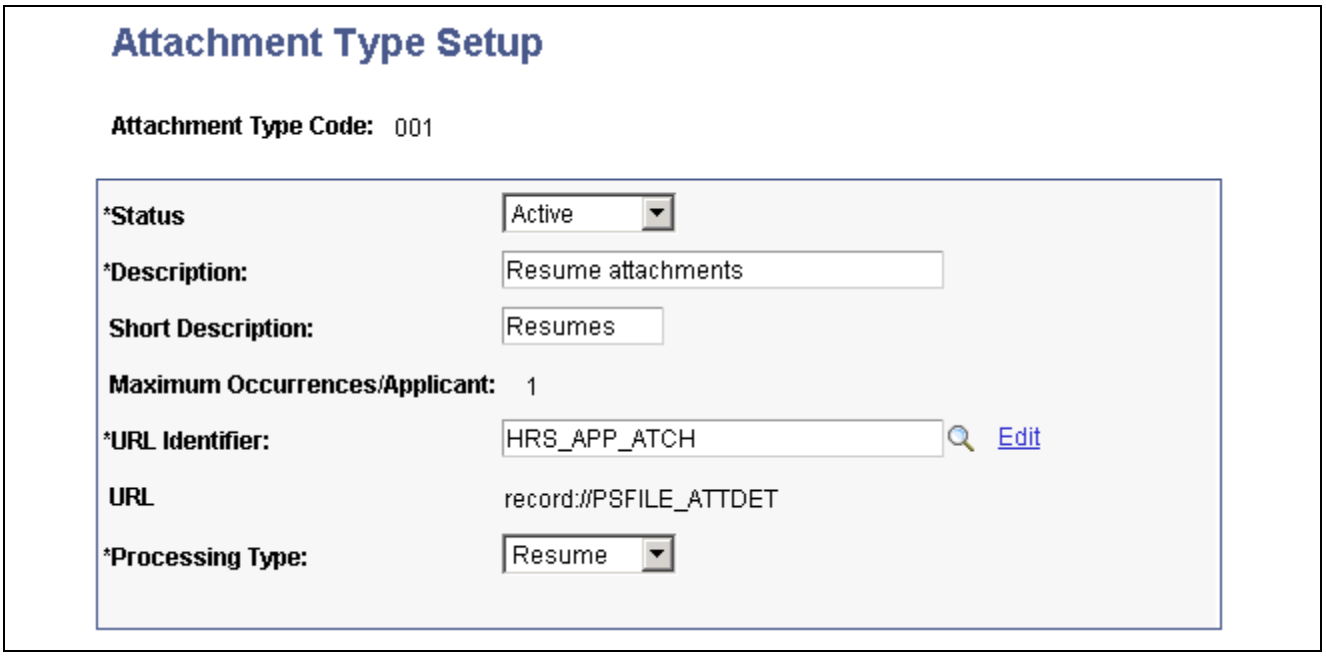
- Resume.
- Reference.
- Transcripts.
- Cover letters.
- Personal References.
- Professional References.
- OIF (Open Integration Framework).

Page Used to Set Up Applications

Page Name	Object Name	Navigation	Usage
Attachment Type Setup	HRS_ATTACHTYPE_TBL	Set Up HRMS, Product Related, Recruiting, Attachment Types, Attachment Type Setup	Define attachments types available for applying online.

Defining Attachment Types

Access the Attachment Type Setup page.



Attachment Type Setup page.

Attachment Type Code Displays the three-digit code that is assigned to the attachment type.

Status Identifies the maximum number of attachments that an applicant can submit for this specific attachment type.

URL Identifier (uniform resource locator identifier) Select the URL address that will house the documents for this attachment type.

Define URL addresses on the URL Maintenance table.

URL (uniform resource locator) Displays the URL address for the selected URL identifier.

Processing Type Identifies the type of attachment. This is used when the applicant applies for a job online or submits additional attachments, or you request references from the applicant. Values are:

OIF Other

Other

Reference

Resume

Setting Up Applicant Communications

To set up applicant communications, use the Contact Method Types (HRS_CNTCT_MTHD), Letter Code Attachment (HRS_LETTER_ATCH), and Correspondence Tokens (HRS_CRSP_TMPL_VAR) components.

This section discusses how to:

- Define contact method types.
- Define letter code tokens.

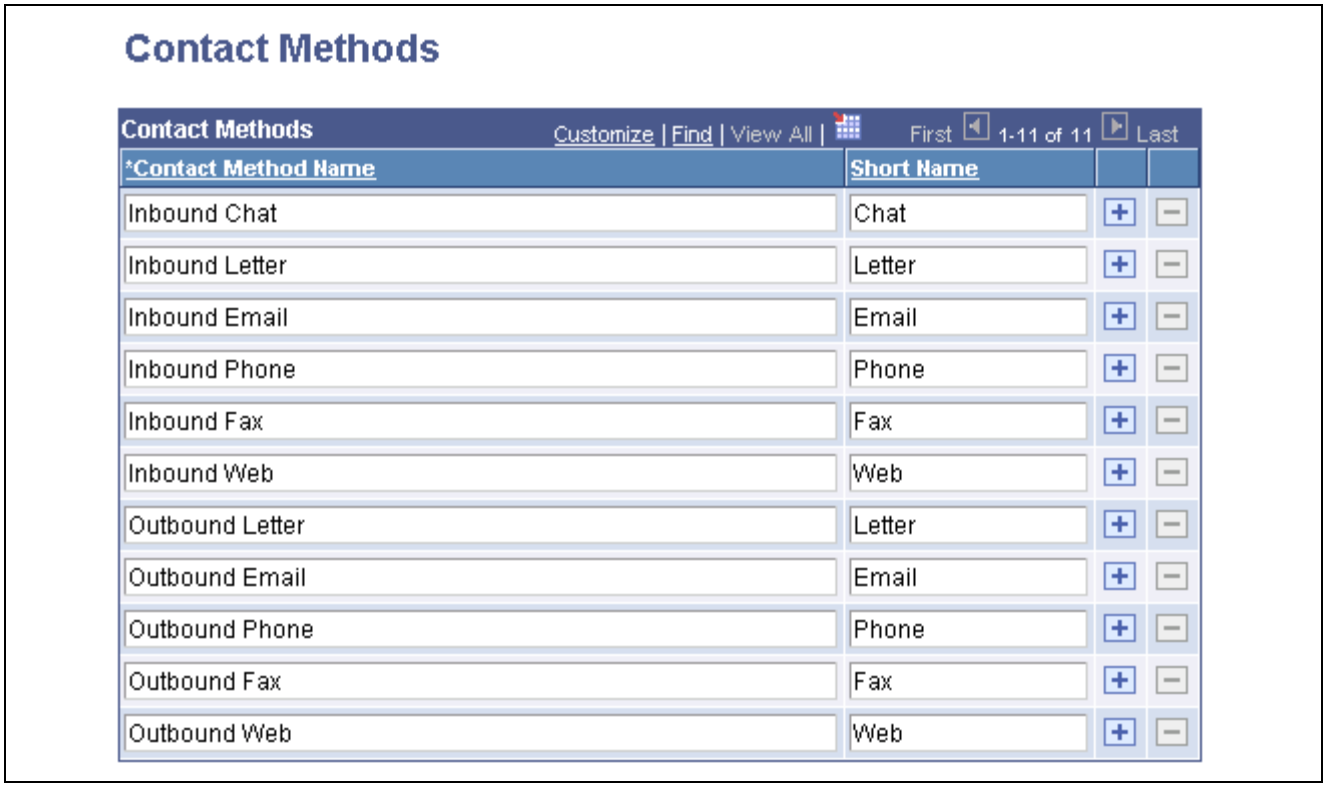
- View delivered correspondence tokens.

Pages Used to Set Up Applicant Communications

Page Name	Object Name	Navigation	Usage
Contact Methods	HRS_CNTCT_MTHD	Set Up HRMS, Product Related, Recruiting, Relationship Management, Contact Method Types, Contact Methods	Define contact method types for reporting and classification purposes.
Letter Template Details	HRS_LETTER_ATCH	Set Up HRMS, Product Related, Recruiting, Relationship Management, Letter Code Tokens, Letter Template Details	Define letter code tokens that are used in recruiting letters.
Correspondence Tokens	HRS_CRSP_TMPL_VAR	Set Up HRMS, Product Related, Recruiting, Relationship Management, Correspondence Tokens, Correspondence Tokens	View delivered correspondence tokens that are used in email or letter templates.

Defining Contact Method Types

Access the Contact Methods page.

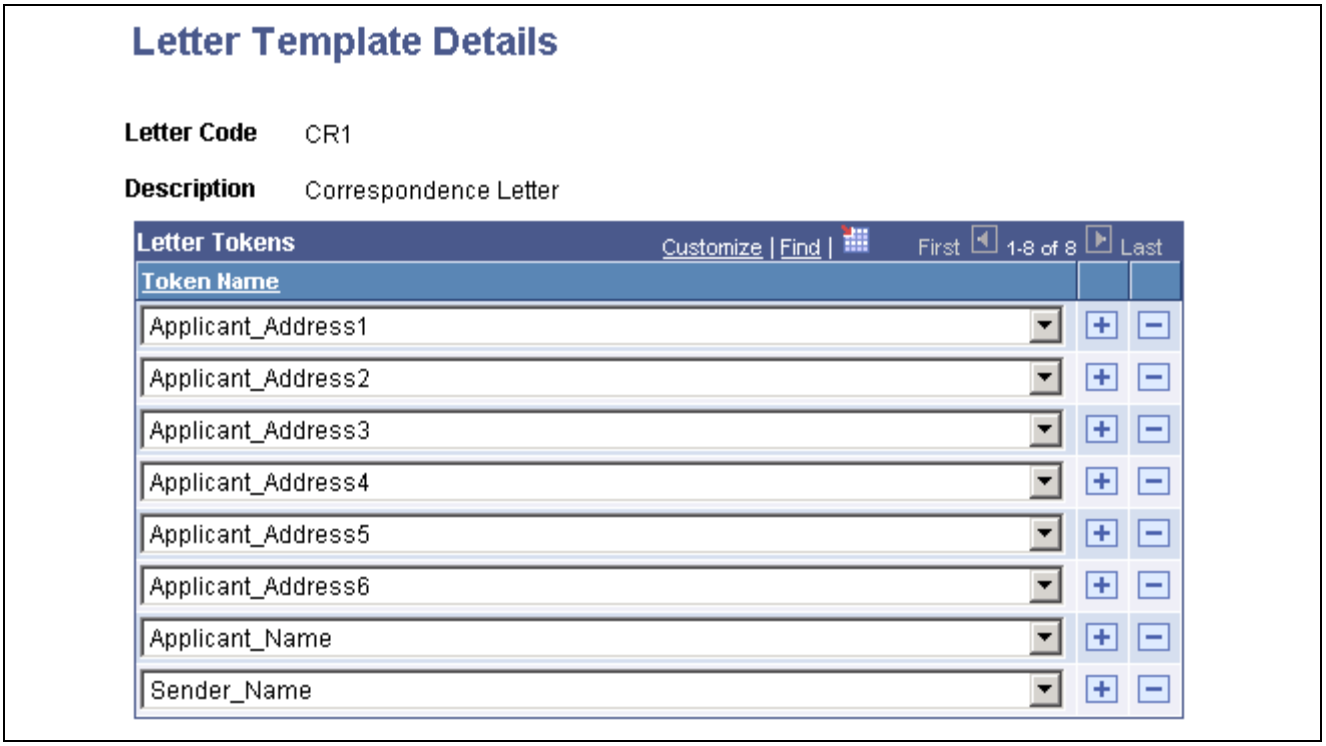


Contact Methods page

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

Defining Letter Code Tokens

Access the Letter Template Details page.

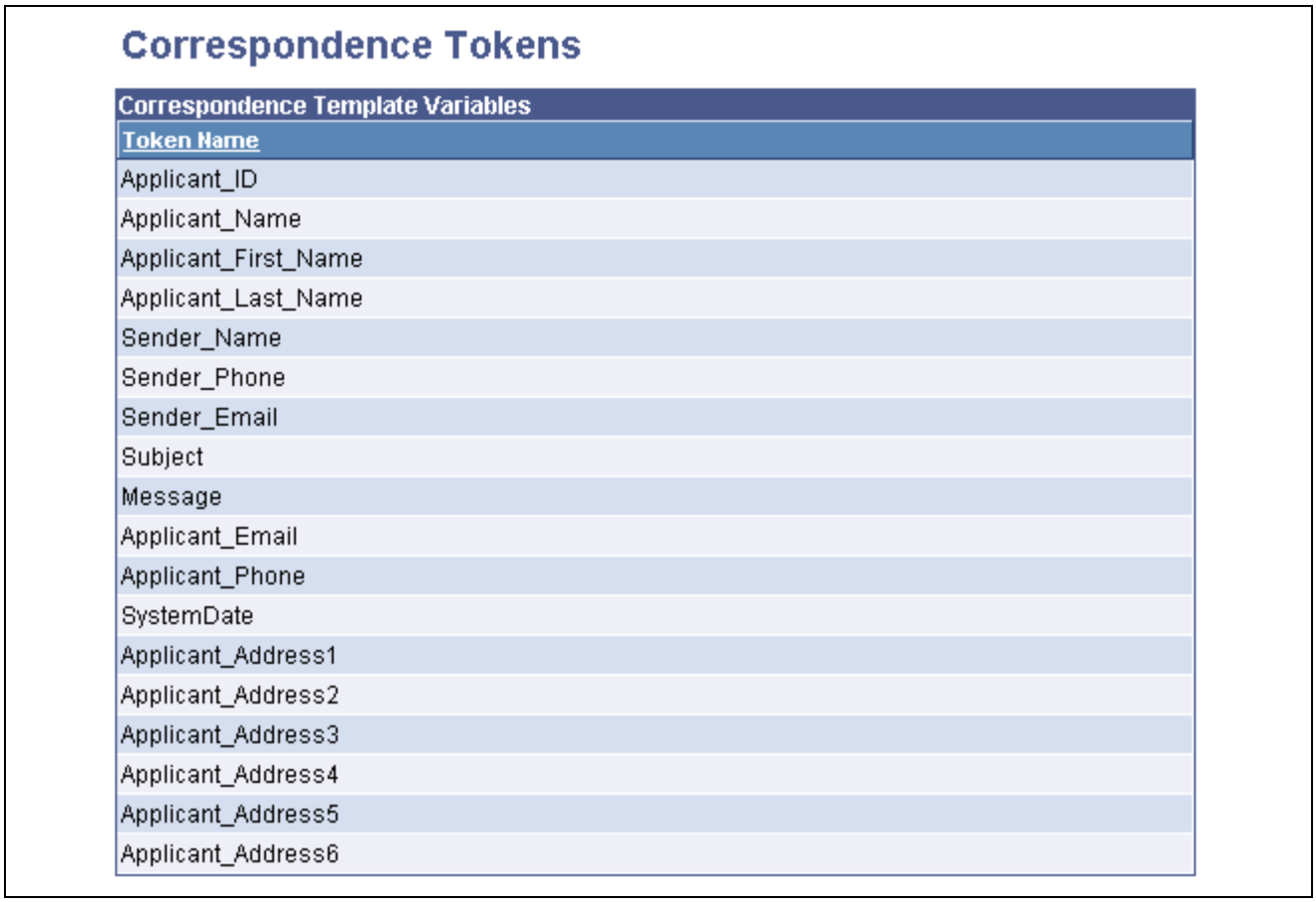


Letter Template Details page

These are the delivered letter tokens.

Viewing Delivered Correspondence Tokens

Access the Correspondence Tokens page.



Correspondence Tokens page

This page displays the list of delivered correspondence tokens.

Setting Up Questionnaires

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

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

- Set up answer definitions.
- Set up question definitions.
- Set up question set definitions.

Understanding Questionnaire Setup

Many organizations use standard questionnaires as part of their screening process. Recruiting Solutions enables you to create questionnaires that are completed by applicants when they apply for a job opening online. Questionnaires can be general in nature or tailored to a specific job opening.

Questionnaires comprise one or more question set definitions. Question set definitions comprise one or more question definitions. Question definitions comprise one or more answer definitions.

When you design your questionnaire, you need to answer these questions:

- What questions do I want the applicants to complete?
- What answers do I want to make available to the applicants for each of the questions?
- How can I group my question and answer combinations to make different question sets?

To create a questionnaire:

1. Create an answer definition for each answer.
2. Create a question definition for each question and link answers to the question.
3. Create a question set definition and link questions to the question set.

Later, when you create a job opening, you can link question sets to the job opening. Remember to add Screening Questions as a section on the job opening template.

See Chapter 3, "Setting Up Recruiting Templates," Setting Up Job Opening Templates, page 40.

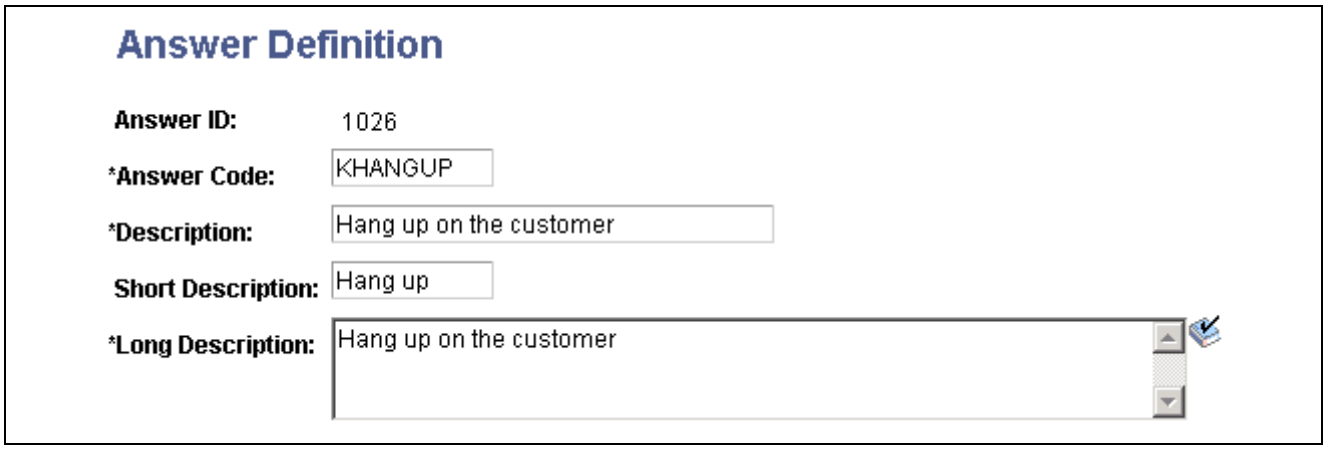
See Chapter 8, "Creating Job Openings," Creating Job Openings, page 144.

Pages Used to Set Up Questionnaires

Page Name	Object Name	Navigation	Usage
Answer Definition	HRS_ANSWER_DEF	Set Up HRMS, Product Related, Recruiting, Screening, Answer Definition, Answer Definition	Set up answer definitions.
Question Definition	HRS_QSTN_DEF	Set Up HRMS, Product Related, Recruiting, Screening, Question Definition, Question Definition	Set up question definitions.
Question Set Definition	HRS_QSTN_SET_DEF	Set Up HRMS, Product Related, Recruiting, Screening, Question Set Definition, Question Set Definition	Set up question set definitions.
Question Answers	HRS_QSTN_SET_ANS	Click the View Answers link on the Question Set Definition page.	View answers to questions.

Setting Up Answer Definitions

Access the Answer Definition page.



Answer Definition page

Answer ID Displays the ID that you entered to identify this answer definition.

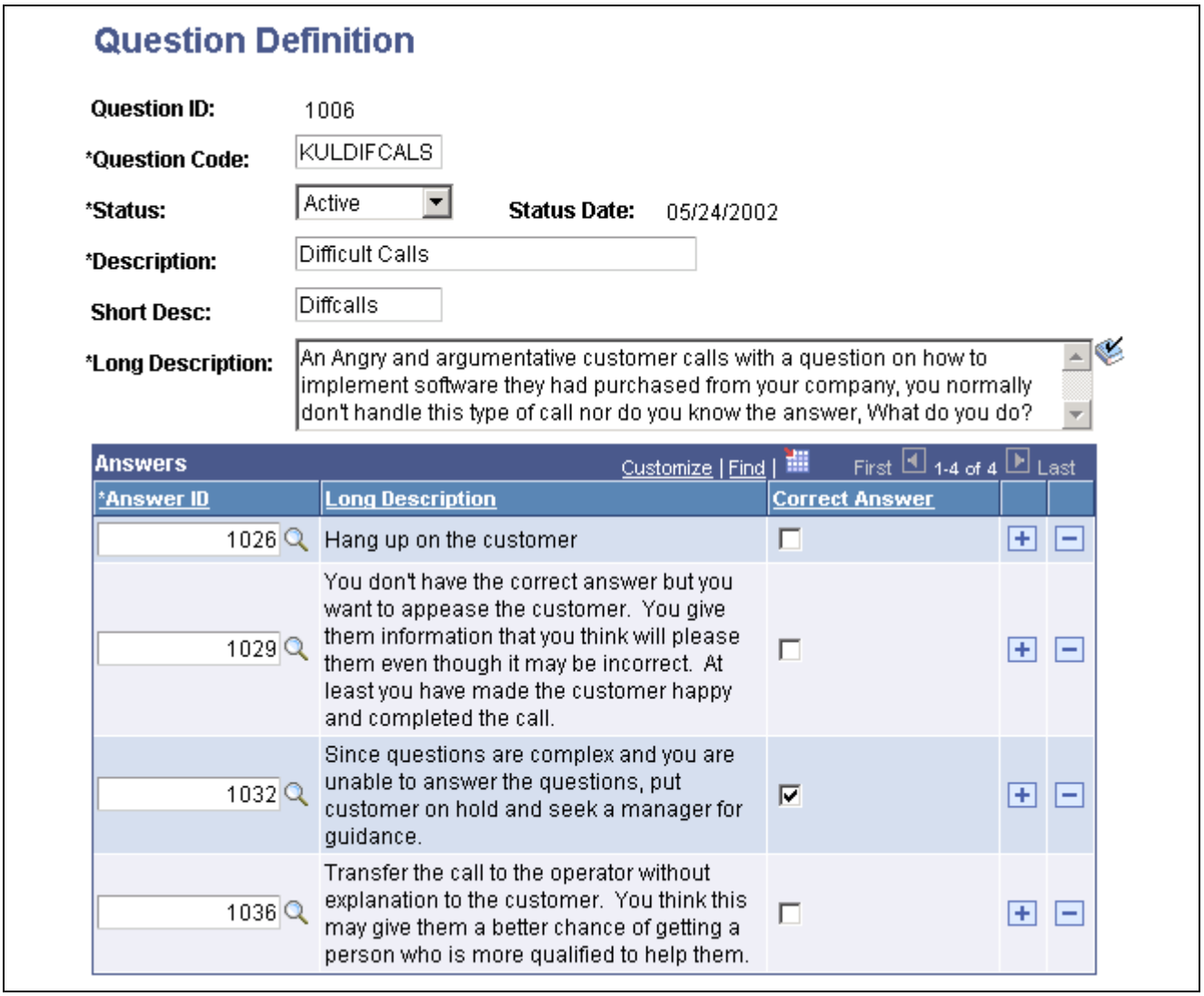
Answer Code Enter a code that identifies this answer.

Description Enter a description for this answer. This description appears in conjunction with the answer code.

Long Description Enter the complete answer to a question. This text appears when you link an answer to a question using the Question Definition page.

Setting Up Question Definitions

Access the Question Definition page.



Question Definition page

Question ID Displays the ID that the system assigned to this question.

Question Code Enter a code that identifies the question.

Description Enter the description for this question.

Long Description Enter the complete description for this question. This text appears when you link a question to a question set by using the Question Set Definition page.

Answers

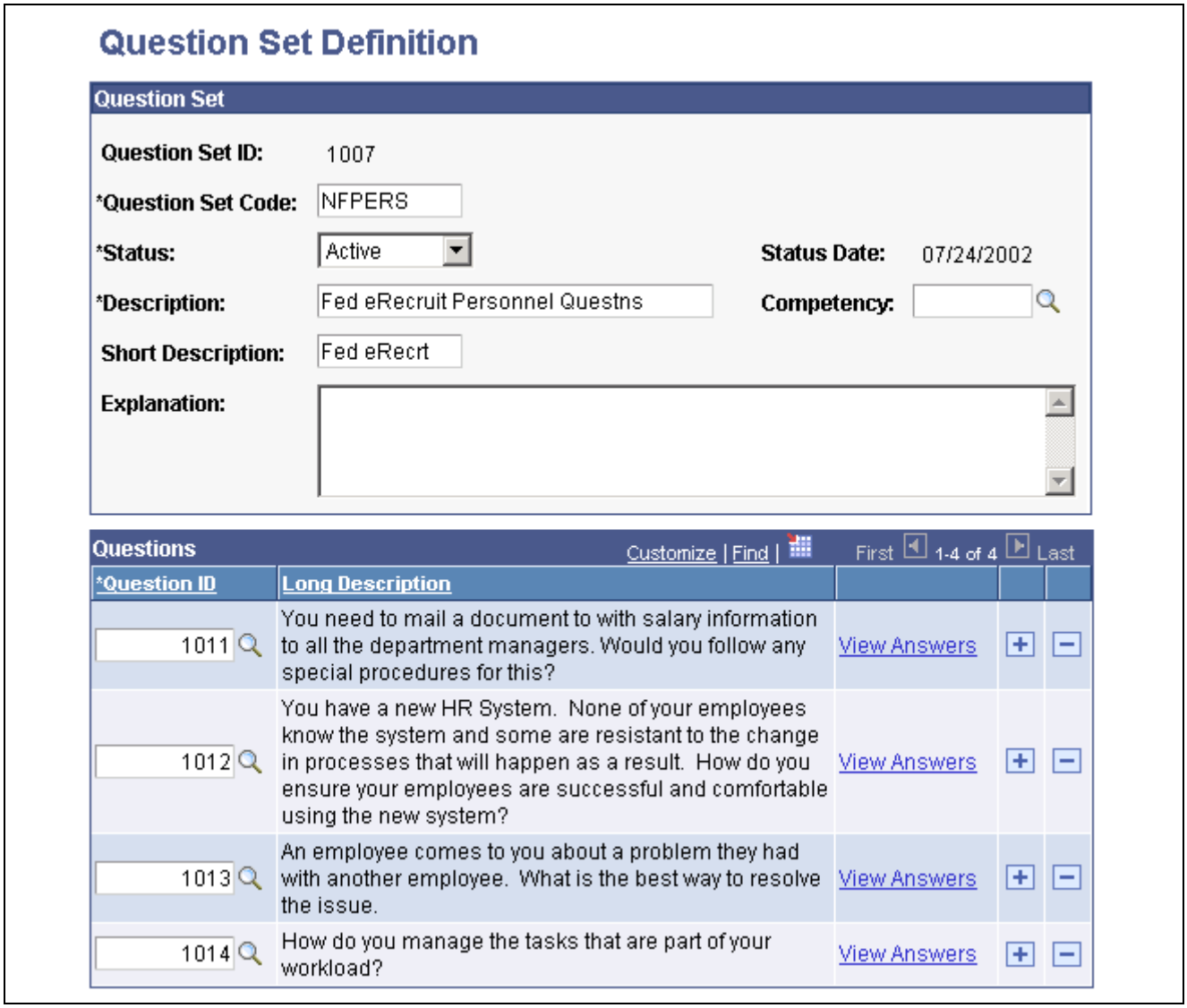
Answer ID Select an answer to link to the question.

Long Description Displays the long description for the selected answer ID.

Correct Answer Select the check box next to the answer that is the correct answer for the question.

Setting Up Question Set Definitions

Access the Question Set Definition page.



Question Set Definition page

Question Set ID Displays the ID that is assigned to the question set.

Question Set Code Enter a code that identifies this question set.

Description Enter text that describes this question set.

Competency Select a competency to link to this question set.

Short Descr (short description) Enter a description for this question set.

Explanation This is used only for information purposes to explain the use or content of the question set.

Questions

Question ID	Select a question ID. Define question ID on the Question Definition page.
Long Description	Displays the long description that is associated with the question.
View Answer	Click to access the Question Answers page, where you can view the correct and incorrect answers to the question. Define answers on the Answer Definition page.

Setting Up Applicant Screening

To set up applicant screening, use the Screening Levels (HRS_SCREEN_TBL), Veterans Preference (HRS_G_VET_PRF_TBL), and Priority Placement (HRS_G_PR_PL_TBL) components.

This section provides overviews of screening definitions, veterans preference codes, and priority placement codes and discusses how to:

- Set up screening definitions.
- (USF) Set up veterans preference codes.
- (USF) Set up priority placement codes.

Understanding Screening Definitions

Screening applicants is the process of identifying applicants whose qualifications match the requirements of a job opening, placing them in some sort of ranking order, narrowing the list, and then routing the best qualified applicants for interviews.

To help you with this process, Recruiting Solutions enables you to define your own screening levels. To define screening levels:

1. Create screening definitions to define the statuses that will be assigned for passing or failing the screening level and the points awarded for passing or failing.
2. Assign one or more screening definitions to a screening template to create screening levels.

   See Chapter 3, “Setting Up Recruiting Templates,” Setting Up Screening Templates, page 45.
3. Use the Create New Job Opening component to assign specific screening criteria to each screening level.

   See Chapter 8, “Creating Job Openings,” Adding Screening Criteria to Screening Levels, page 165.

PeopleSoft delivers the following screening definitions:

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

(USF) Understanding Veterans Preference Codes

Veterans preference is an employee's category of entitlement to preference in the federal service based on active military service that was terminated honorably. Veterans preference is defined according to the internal policies and regulations issued by the Office of Personnel Management (OPM).

PeopleSoft delivers the following veterans preference codes:

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

To create a veterans preference code, you enter a description, recruitment code, and number of points to add to the applicant's score.

The veterans preference is used when the Consider Veterans Preference option is selected; the veterans preference codes, and their associated values, will be added to the employee's existing scoring to enhance their numerical rating. The veterans preference code that is assigned to an employee also determines where the individual ranks on the order of certification (Certificate of Eligibles). Veterans preference can also be applied to break a tie between candidates and determine the correct ranking order.

(USF) Understanding Priority Placement Codes

Some applicants are entitled to automatic consideration for job openings that meet certain criteria whether they apply for them or not. An applicant is given this special consideration entitlement as the result of being involuntarily displaced or an involuntary position change. Priority placement is defined according to the internal policies and regulations issued by the OPM.

PeopleSoft delivers the following priority placement codes:

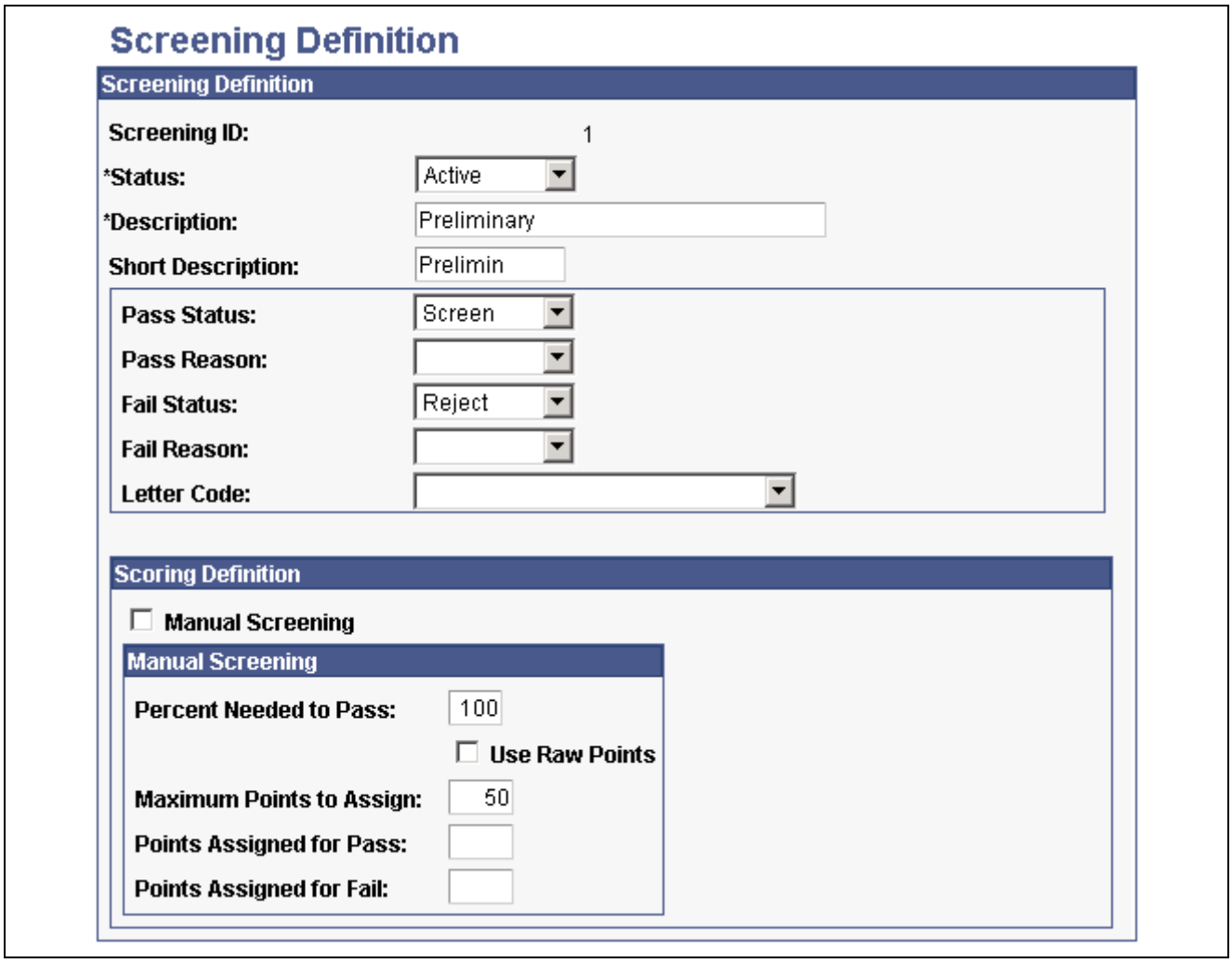
Priority Placement Code	Weight	Description
CTP	6	Career Transition Assistance Plan
ICT	4	Interagency Career Transition Assistance Plan
PPP	5	Priority Placement Program
RLP	3	Re-employment Priority List
RRS	5	Regional Reduction

Pages Used to Set Up Applicant Screening

Page Name	Object Name	Navigation	Usage
Screening Definition	HRS_SCREEN_TBL	Set Up HRMS, Product Related, Recruiting, Screening, Screening Levels, Screening Definition	Set up screening definitions.
Setup Veterans Preference	HRS_G_VET_PRF_TBL	Set Up HRMS, Product Related, Recruiting, Screening, Veterans Preference, Setup Veterans Preference	(USF) Set up veterans preference codes.
Priority Placement	HRS_G_PR_PL_TBL	Set Up HRMS, Product Related, Recruiting, Screening, Priority Placement, Priority Placement	(USF) Set up priority placement codes.

Setting Up Screening Definitions

Access the Screening Definition page.



Screening Definition page

Screening Definition

Enter basic information about the screening level.

Screening ID Displays the ID that was automatically assigned to this screening level.

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

Description Enter a description to be used on the View Questions Results page as a screening level description and on the Job Opening - Job Opening Screening Criteria page as a description in the Screening Requirements group box.

Group Box

Select pass and fail statuses and their associated reasons. Enter the letter code that you want sent to the applicant when they fail the screening level.

Pass Status Select the screening status that will be assigned to the applicant if the applicant passes this level.

Pass Reason Select a reason for this assigned status.

Fail Status Select the screening status that will be assigned to the applicant if the applicant fails this level.

Fail Reason Select a reason for this assigned status.

Letter Code Select the letter that you want sent to the applicant if the applicant fails this level.

Scoring Definition

Manual Screening Select if you want a recruiter or manager to assign points.

Percent Needed to Pass Enter the minimum percentage amount of the total points assigned on the Job Opening Screening Criteria page that an applicant must have to pass the screening level.

Use Raw Points Select if the accumulated points for an applicant will be used to determine whether they pass or fail the screening level. If this check box is selected, do not specify a maximum amount of points to assign.

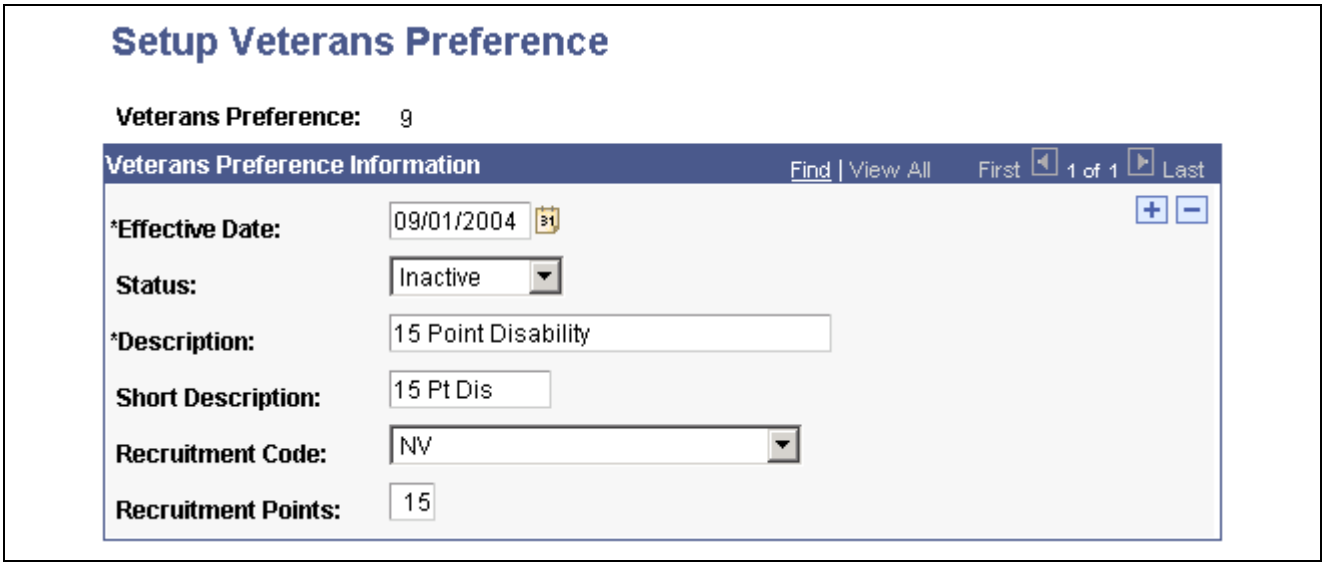
Maximum Points to Assign Define the maximum number of points that can be earned by an applicant for the screening level regardless of the points that are earned according to the job opening screening criteria.

Points Assigned for Pass Defines the points that are assigned to the applicant if the applicant passes the screening level. This overrides any earned points that the applicant received as defined by the job opening screening criteria.

Points Assigned for Fail Defines the points that are assigned to the applicant if the applicant fails the screening level. This overrides any earned points that the applicant received as defined by the job opening screening criteria.

Setting Up Veterans Preference Codes

Access the Setup Veterans Preference page.



Setup Veterans Preference page

Veterans Preference Information

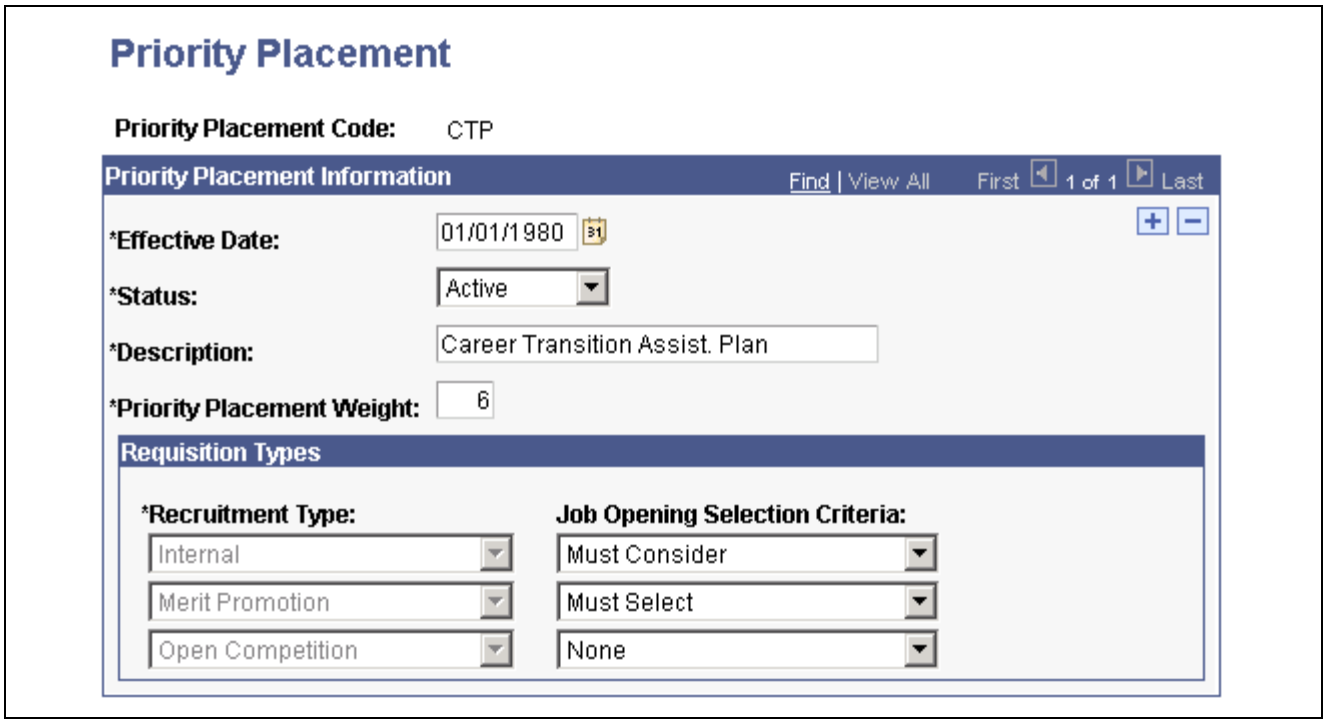
Enter the basic information about the veterans preference. Select a recruitment code and assign the points to it.

Recruitment Code Select the recruitment code.

Recruitment Points Enter the number of points that are associated with this veterans preference code.

Setting Up Priority Placement Codes

Access the Priority Placement page.



Priority Placement page

Priority Placement Information

Enter the basic information about the priority placement code and assign a weight to it. A value of 1 is the highest weight. A priority placement program with a weight of 1 will carry more weight during the ranking process than a priority placement program with a weight of 2 and so on.

Requisition Types

Define the selection criteria for each type of requisition. You can select from *None, Must Consider,* and *Must Select.*

For example, for an internal requisition, you would determine whether applicants with this priority placement code must be selected or considered during the selection process or whether no special placement exists for this requisition type.

Setting Up Interview Evaluations

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

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

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

Understanding Interview Evaluation Setup

Three criteria make up an interview evaluation:

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

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

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

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

- Interview types define how you conduct the interview.

  PeopleSoft delivers five interview types: Inhouse1, Inhouse2, Inhouse3, Campus, and Phone.

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

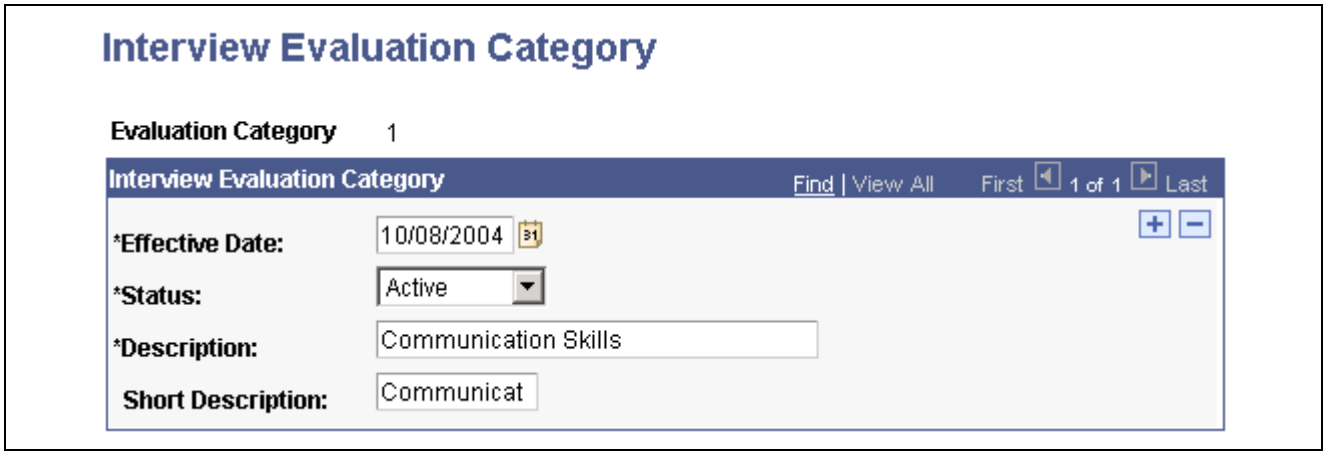
See Chapter 3, “Setting Up Recruiting Templates,” Setting Up Interview Evaluation Templates, page 47.

Pages Used to Set Up Interview Evaluations

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

Creating Interview Evaluation Categories

Access the Interview Evaluation Category page.



Interview Evaluation Category page

Creating Interview Ratings

Access the Interview Evaluation Ratings page.

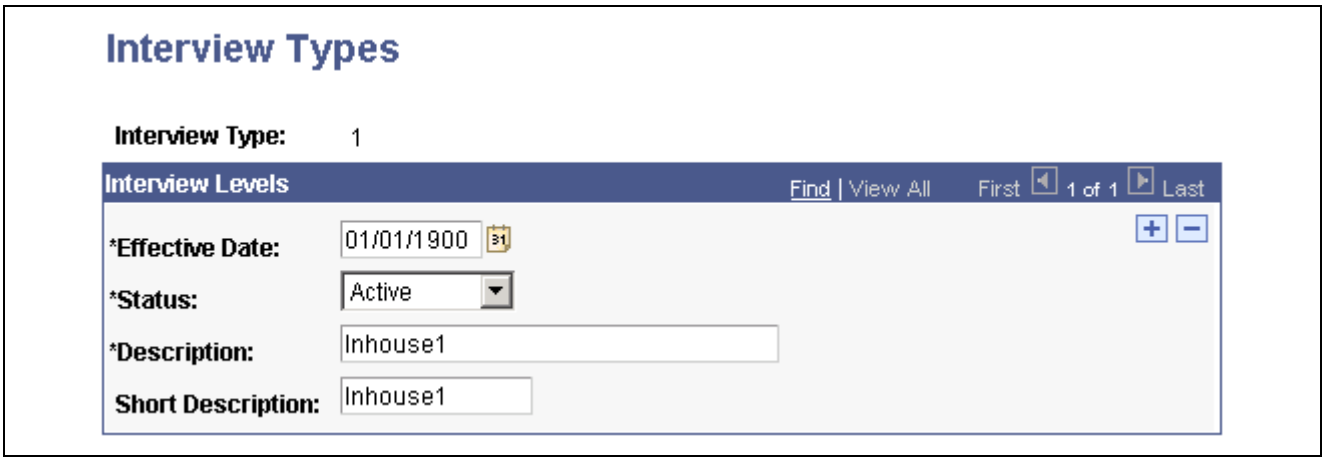


Interview Evaluation Ratings page

Score Enter a score for this evaluation rating.

Creating Interview Types

Access the Interview Types page.



Interview Types page

Setting Up Job Offers

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

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

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

Understanding Job Offer Setup

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

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

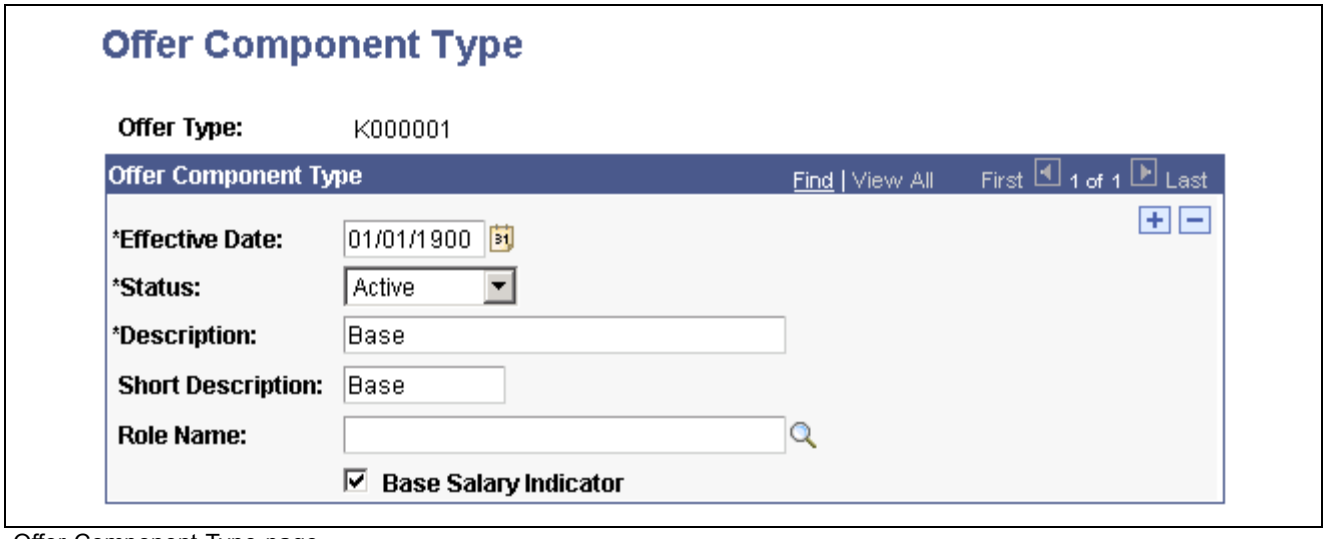
See Chapter 13, "Making Job Offers," page 287.

Pages Used to Set Up Job Offers

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

Creating Job Offer Component Types

Access the Offer Component Type page.



Offer Component Type page

Role Name Select the role that is responsible for administering the offer component type. For example, if you create a component type for stock options, you would link this to the stock administrator role.

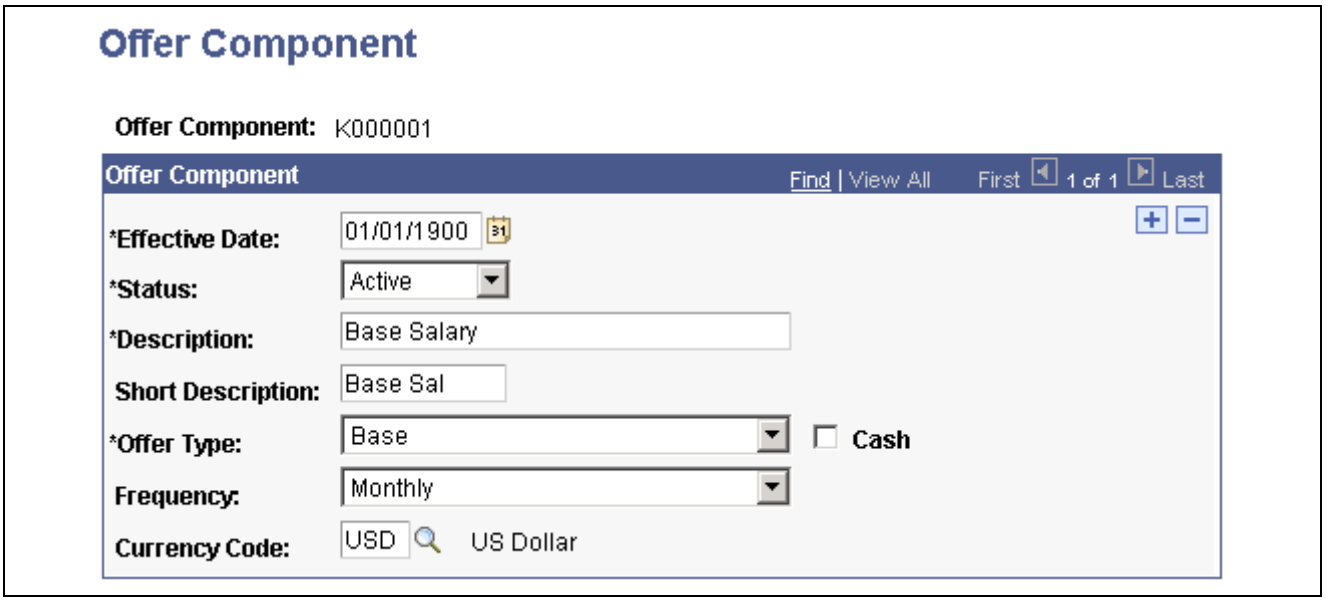
If you set up email workflow, the system sends an email to the person with the selected role to notify that person of new hires.

See *Enterprise PeopleTools 8.45 PeopleBook: Security Administration*

Base Salary Indicator Select if the component type forms part of the base salary. The system uses this check box to calculate the total base salary. When a job offer is entered, the system checks whether the base salary exceeds the maximum salary grade range for the job. You define the salary grades for a job opening on the Salary Grades page.

Entering Job Offer Component Information

Access the Offer Component page.



Offer Component page

Offer Type Select the type of offer from the available component types. Define component types on the Offer Component Types page.

Cash Select if the offer component is received as cash. For example, base salary is a cash component, so you would select this check box, but for stock options, you would leave the check box clear because stock options are not paid out as cash.

When this check box is selected, the system will verify that the frequency and currency codes are defined on Offer Component page.

This check box appears on the Offer Details page.

Frequency Enter the frequency at which this component will be paid.

Currency Code Enter the currency that will be used to pay this component.

Setting Up the Hiring Process

To set up the hiring process, use the Data Transfer to HR (HRS_MNG_HIR_STP) component.

This section discusses how to:

- Define person data to transfer.

- Define competencies to transfer.
- Define additional data to transfer.

Common Element Used in This Section

Type of Hire Select the type of hire. Values are:

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

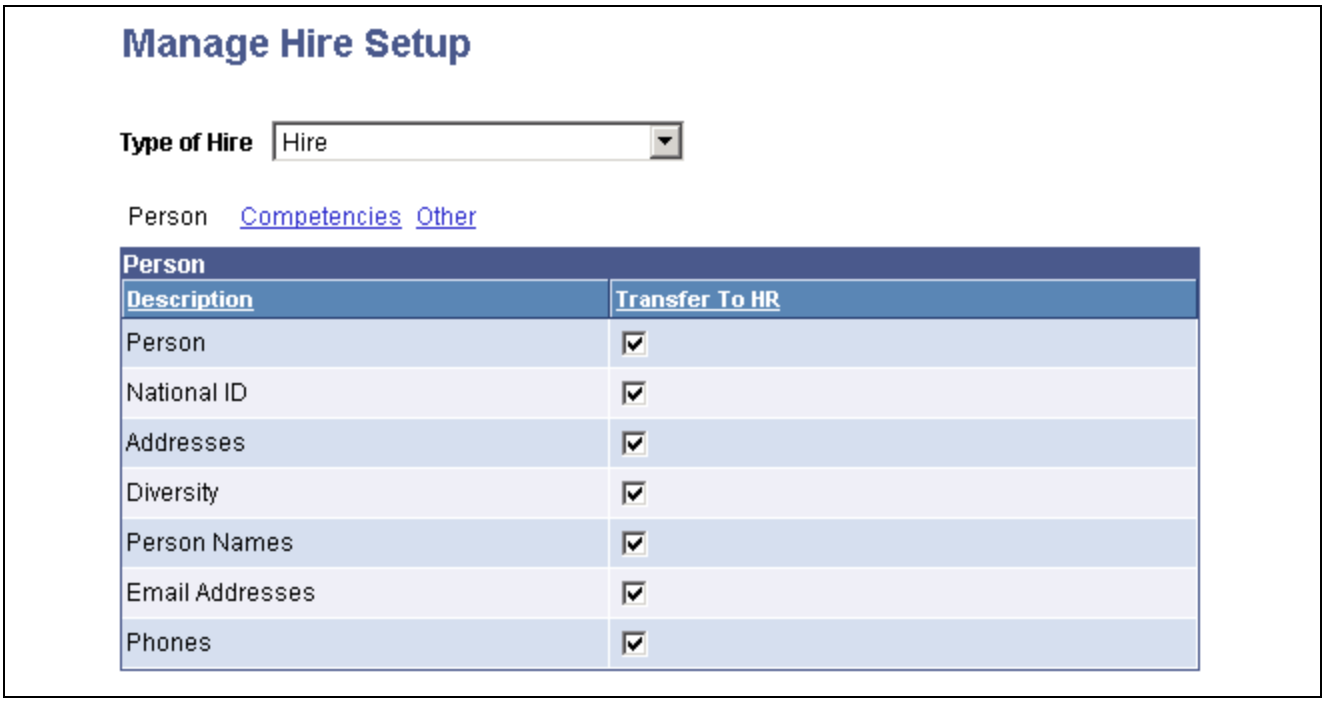
Transfer to HR (transfer to human resources) Select the check box next to the information that you want transferred to the HR database for this type of hire.

Pages Used to Set Up the Hiring Process

Page Name	Object Name	Navigation	Usage
Manage Hire Setup - Person	HRS_MNG_HIR_STP	Set Up HRMS, Product Related, Data Transfer to HR, Manage Hire Setup - Person	Define what personal data you want transferred to the HR database when the applicant is hired.
Manage Hire Setup - Competencies	HRS_MNG_HIR_STP	Set Up HRMS, Product Related, Data Transfer to HR, Manage Hire Setup - Competencies	Define what competencies you want transferred to the HR database when the applicant is hired.
Manage Hire Setup - Other	HRS_MNG_HIR_STP	Set Up HRMS, Product Related, Data Transfer to HR, Manage Hire Setup - Other	Define additional data that you want transferred to the HR database when the applicant is hired.

Defining Person Data to Transfer

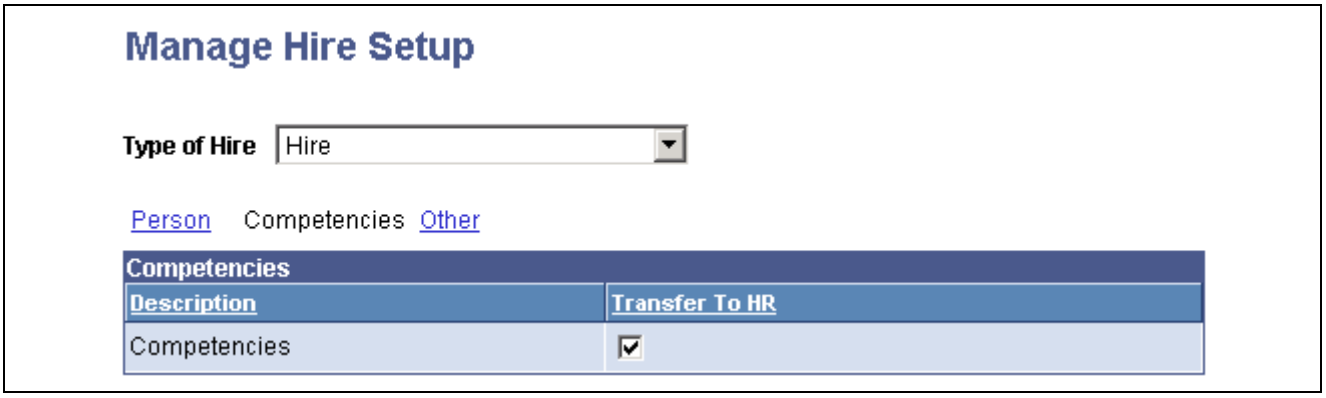
Access the Manage Hire Setup - Person page.



Manage Hire Setup - Person page

Defining Competencies to Transfer

Access the Manage Hire Setup - Competencies page.



Manage Hire Setup - Competencies page

Defining Miscellaneous Data to Transfer

Access the Manage Hire Setup - Other page.



Manage Hire Setup - Other page

CHAPTER 3

Setting Up Recruiting Templates

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

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

Understanding Recruiting Templates

Recruiting templates control the layout of the page and the information that appears on a page in Talent Acquisition Manager. For example, a resume template controls what an applicant sees when they apply for a particular job opening online and a job opening template controls what a recruiter sees when they create a job opening.

PeopleSoft Talent Acquisition Manager enables you to create five different templates:

- Resume templates, which define the content that you want applicants to provide when applying for a job online.
- Job opening templates, which define the layout and content that goes into creating a job opening.
- Job posting templates, which define the layout and content that goes into a job posting.
- Screening templates, which define the criteria by which job requirements are matched to applicant qualifications.
- Interview Evaluation templates, which define the questions that interviewers ask applicants during an interview.

You can have as many templates as you want. You can create a set of templates based on a specific type of job opening, such as a set for customer service representatives and another set for maintenance personnel.

After these templates are created, you link them together on a recruitment template, which is tied to a job opening. During the recruitment process, the system uses the recruitment template that is tied to the job opening to determine how that job opening is to be processed.

Note. Resume templates are discussed in the Candidate Gateway PeopleBook.

See *PeopleSoft Enterprise Candidate Gateway 8.9 PeopleBook*, “Setting Up Candidate Gateway,” Setting Up Resume Templates.

Setting Up Job Opening Templates

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

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

- Identify job opening templates.
- Define job opening template structure.

Understanding Job Opening Templates

Job opening templates are used to define the number of pages and the sections that appear on those pages when a user creates a new job opening by using the Create New Job Opening (HRS_JO_LAUNCH) component.

The layout can be either one long page with all job opening sections or as many as 17 separate pages with one section displaying on page each. Each page can be named according to the sections that appear on the page.

PeopleSoft delivers the following job opening sections from which you can choose:

- Competencies.
- Education and Experience.
- Hiring Manager Assignments.
- Honors and Awards.
- Interested Party Assignments.
- Interviewer Assignments.
- Job Information: This always appears on the first page as the first section and cannot be changed.
- Job Postings.
- Languages.
- Licenses and Certificates.
- Memberships.
- Recruiter Assignments.
- Salary Information.
- Screening Options.
- Screening Questions.
- Staffing Information.
- Tests.
- Works Council Information.

  This only appears as an option if you select the Optional Works Council option on the Recruiting Installation - Installation Options page.

Job opening templates need to coordinate with resume templates. Otherwise, a mismatch may occur between job requirements and the information that applicants supply by applying online. For example, if you want to screen applicants based on their competencies, then you must select the competencies sections on both the job opening template and resume template.

Prerequisite

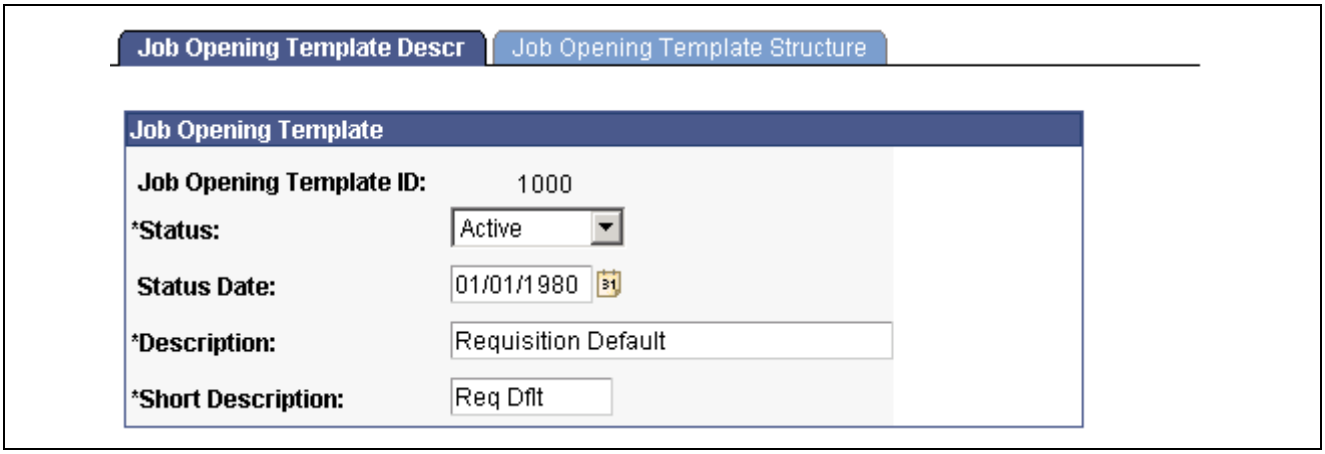
For the Works Council Information section to appear as an option in the job opening template, you must select the Optional Works Council option on the Recruiting Installation - Installation Options page.

Pages Used to Set Up Job Opening Templates

Page Name	Object Name	Navigation	Usage
Job Opening Template Descr (job opening template description)	HRS_JO_TMPL_DESCR	Set Up HRMS, Product Related, Recruiting, Templates, Job Opening Template, Job Opening Template Descr	Identify job opening templates.
Job Opening Template Structure	HRS_JO_TMPL_STRUCT	Set Up HRMS, Product Related, Recruiting, Templates, Job Opening Template, Job Opening Template Structure	Define job opening template structure.

Identifying Job Opening Templates

Access the Job Opening Template Descr page.

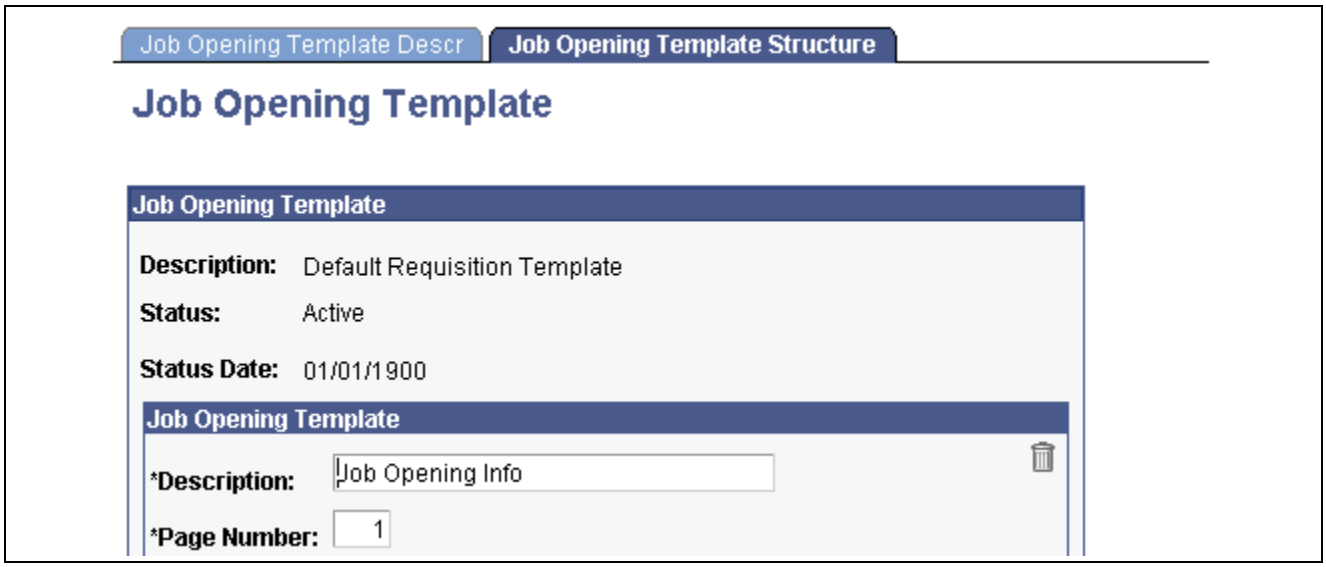


Job Opening Template Descr page

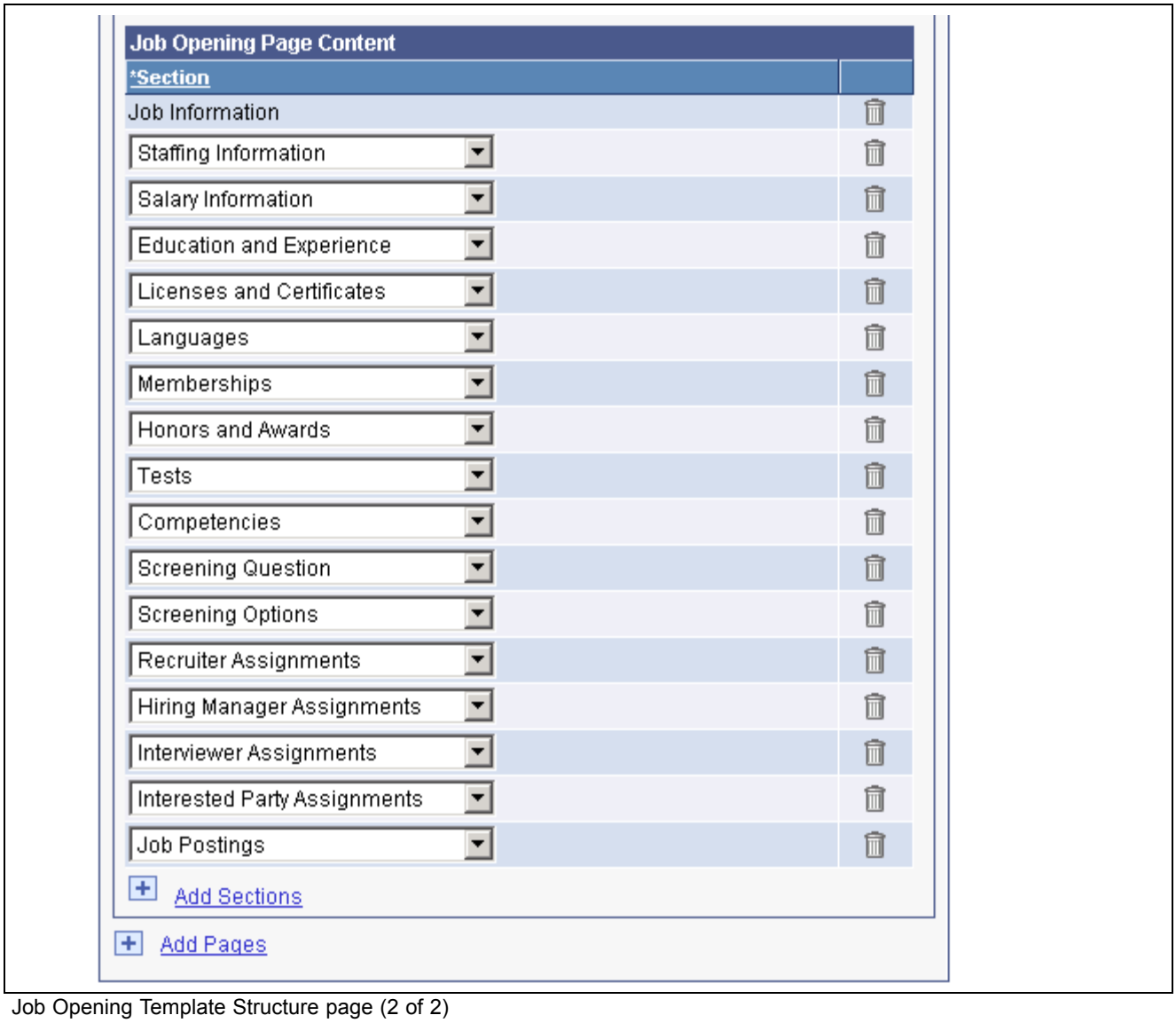
Job opening template IDs are automatically assigned when you create a job opening template.

Defining Job Opening Template Structure

Access the Job Opening Template Structure page.



Job Opening Template Structure page (1 of 2)



Job Opening Template Structure page (2 of 2)

Job Opening Template

Description Enter the title that will appear as the link for this page on the Job Opening page.

Page Number Enter the page number that will be assigned to the current section. This field determines the order in which multiple pages will appear to the user during the Create New Job Opening process. If only one page is defined, all selected sections will appear on one long page.

Job Opening Page Content

Section Select a job opening section or sections that you want included on this page. The Job Information section will always appear first, on the first page. It's display-only and cannot be edited.

Add Sections Click to add another job opening section to the page.

Add Pages Click to add another page. This causes an additional page to appear to the user when the user is creating a new job opening using the Create New Job Opening (HRS_JO_LAUNCH) component.

Setting Up Job Opening Posting Templates

To set up job opening posting templates, use the Job Opening Posting (HRS_JO_PST_TMPL) component.

This section provides an overview of job opening posting templates, lists prerequisites, and discusses how to create a job opening posting template.

Understanding Job Opening Posting Templates

Job opening posting templates are used to define which sections or description types you want included in the job posting. Description types are categories of information that you want to make up the entire job posting. In your job posting, you may want to include statements about your company, the job responsibilities, and required qualifications.

Prerequisites

Before you can set up a job posting template:

1. Define posting description types.
2. Create posting descriptions.

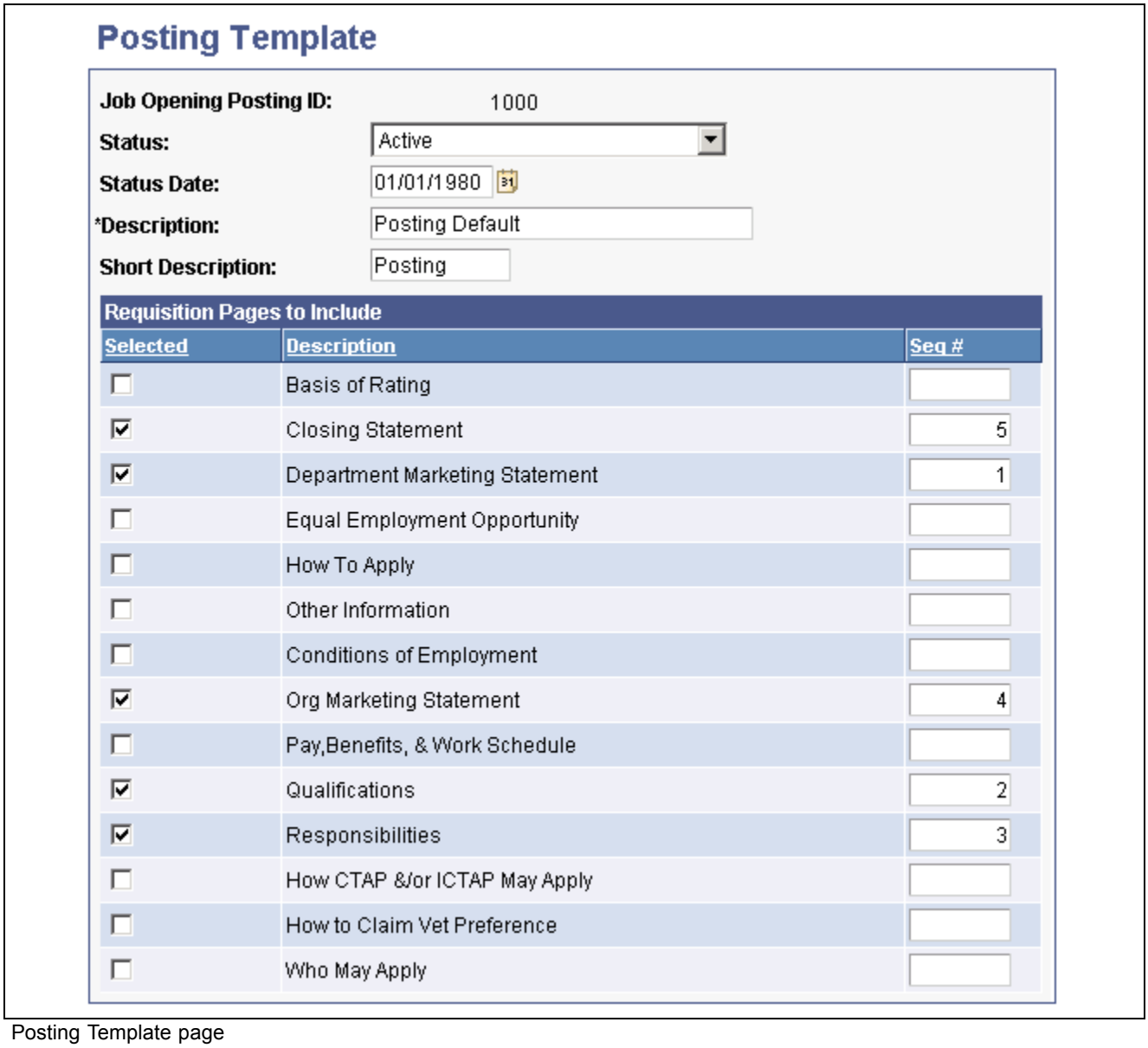
See Chapter 2, "Setting Up the Recruiting Process," Setting Up Job Postings, page 13.

Page Used to Set Up Job Opening Posting Templates

Page Name	Object Name	Navigation	Usage
Posting Template	HRS_JO_PST_TMPL	Set Up HRMS, Product Related, Recruiting, Templates, Job Opening Posting Template, Job Opening Posting Template	Create a job opening posting template.

Creating a Job Opening Posting Template

Access the Posting Template page.



Posting Template page

Requisition Pages to Include

The description types that are displayed come from those that are entered on the Posting Descriptions page that have an Active status. The descriptions that you select here will automatically populate the job posting descriptions when you create a job opening.

Selected Select the check box next to the description that you want included in the job posting.

Seq # (sequence number) Enter the order in which you want the description to appear in the job posting.

Setting Up Screening Templates

To set up screening templates, use the Screening Template (HRS_SCREEN_TMPL) component.

This section provides an overview of screening templates, list a prerequisite, and discusses how to create a screening template.

Understanding Screening Templates

Screening templates define the number of screening levels and the order in which screening levels are processed. They also define the total points that can be awarded during the screening process. For federal users, they define the crediting and ranking information.

Specific screening criteria is defined when you create the job opening.

See Chapter 8, "Creating Job Openings," Adding Screening Criteria to Screening Levels, page 165.

Prerequisite

Before you begin to set up screening templates, define screening levels.

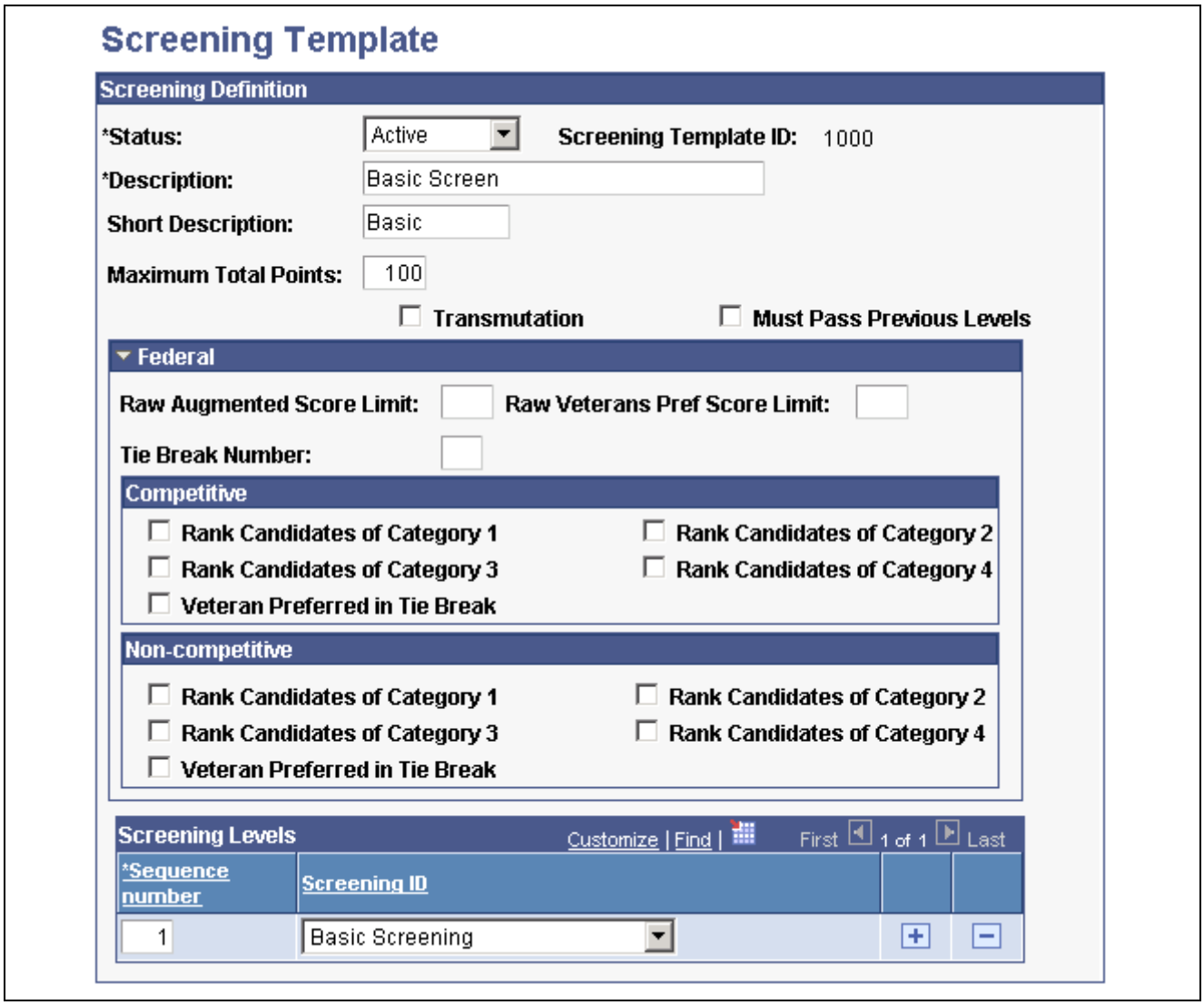
See Chapter 2, "Setting Up the Recruiting Process," Setting Up Applicant Screening, page 25.

Page Used To Set Up Screening Templates

Page Name	Object Name	Navigation	Usage
Screening Template	HRS_SCREEN_TMPL	Set Up HRMS, Product Related, Recruiting, Templates, Screening Template, Screening Template	Create a screening template.

Creating a Screening Template

Access the Screening Template page.



Screening Template page

Screening Definition

Maximum Total Points Enter the maximum points that an applicant can accumulate for the entire screening process.

(USF) Transmutation Select if the score is to be transmuted, based on either an hourly or salaried job.

Must Pass Previous Levels Total Points Select if the applicant must pass the previous screening level before being evaluated for the next screening level.

(USA) Federal

Raw Augmented Score Limit Enter the maximum number of points that are to be added to an applicant's total score when special qualifications exist that may not be significant according to the qualification standards, but may contribute to the success in this position.

Raw Veterans Pref Score Limit (raw veterans preference score limit) Enter the maximum number of points that can be assigned to an applicant's score for veterans preference.

Tie Break Number Enter a number that can be used as a tie breaker when two or more applicants have the same score.

(USF) Competitive

Rank Candidates of Category 1 Select to indicate that when the ranking process is used, the applicants will be ranked according to category 1.

Category 1 ranking is Qualified/Well-Qualified/Best_Qualified Preference Eligibles with Must Select for the given recruitment type.

Rank Candidates of Category 2 Select to indicate that when the ranking process is used, the applicants will be ranked according to category 2.

Category 2 ranking is Well-Qualified/Best_Qualified Preference Eligibles with Must Consider for the given recruitment type.

Rank Candidates of Category 3 Select to indicate that when the ranking process is used, the applicants will be ranked according to category 3.

Category 3 ranking is Best Qualified Non-Preference Eligibles or Best Qualified Preference Eligibles with None for the given recruitment type.

Rank Candidates of Category 4 Select this check box to indicate that when ranking process is used, the applicants will be ranked according to category 4.

Category 4 ranking is Qualified/Well-Qualified Non-Preference Eligibles or Qualified/Well-Qualified Preference Eligibles with None for the given recruitment type.

Veteran Preferred in Tie Break Select if you want a veteran status to be used as a tiebreaker.

(USF) Noncompetitive

Same as (USF) Competitive.

Screening Levels

Sequence number Enter a number to use to determine the order in which the system will run the screening level in relation to other screening levels.

Screening ID Select the screening level that you want to associate with the sequence number.

Setting Up Interview Evaluation Templates

To set up interview evaluation templates, use the Interview Evaluation Templates (HRS_INT_EVL_DFN) component.

This section provides an overview of interview evaluation templates, lists prerequisites, and discusses how to create an interview evaluation template.

Understanding Interview Evaluation Templates

Interview evaluation templates define the information that interviewers enter when they complete an interview evaluation. Using the categories that you created on the Interview Evaluation Categories page, the ratings that you created on the Interview evaluation ratings page, and the statuses from recruiting statuses, you can tailor interview evaluations to fit any situation that is required by your organization.

See Also

Chapter 12, "Interviewing Applicants," Completing Interview Evaluations, page 277

Prerequisites

Before you to set up interview evaluation templates, you must set up:

1. Interview evaluation categories.
2. Interview evaluation ratings.

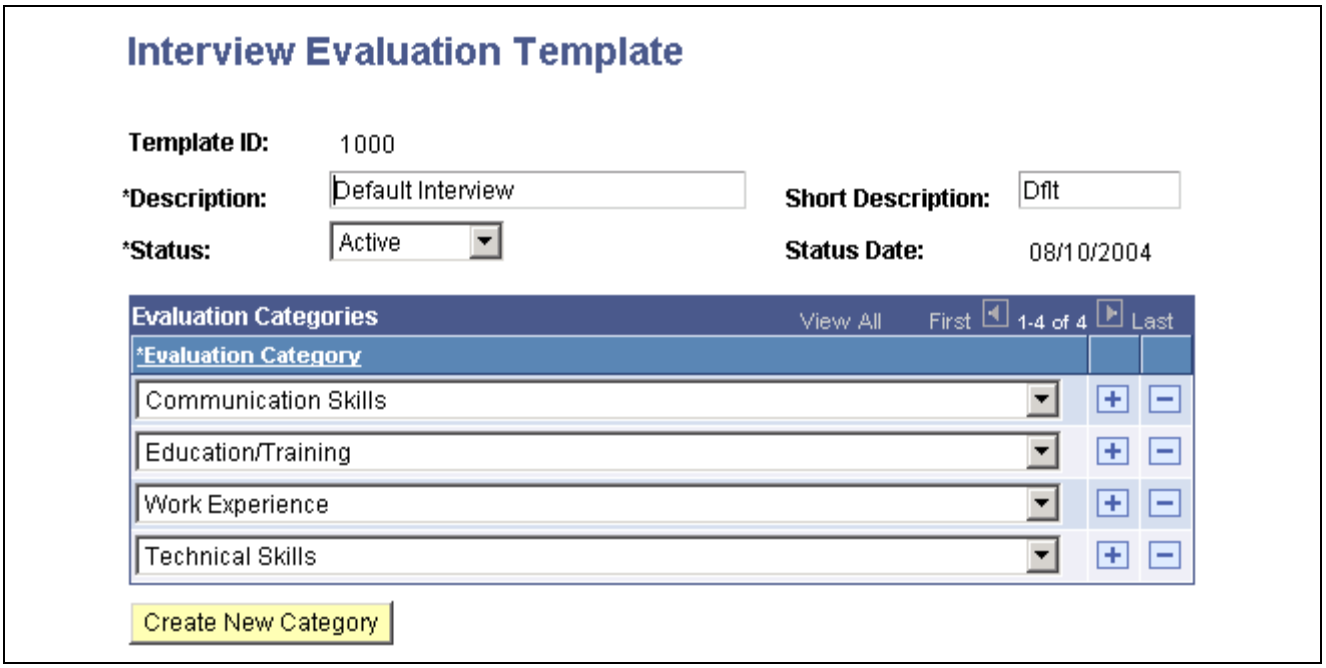
See Chapter 12, "Interviewing Applicants," Completing Interview Evaluations, page 277.

Page Used to Set Up Interview Evaluation Templates

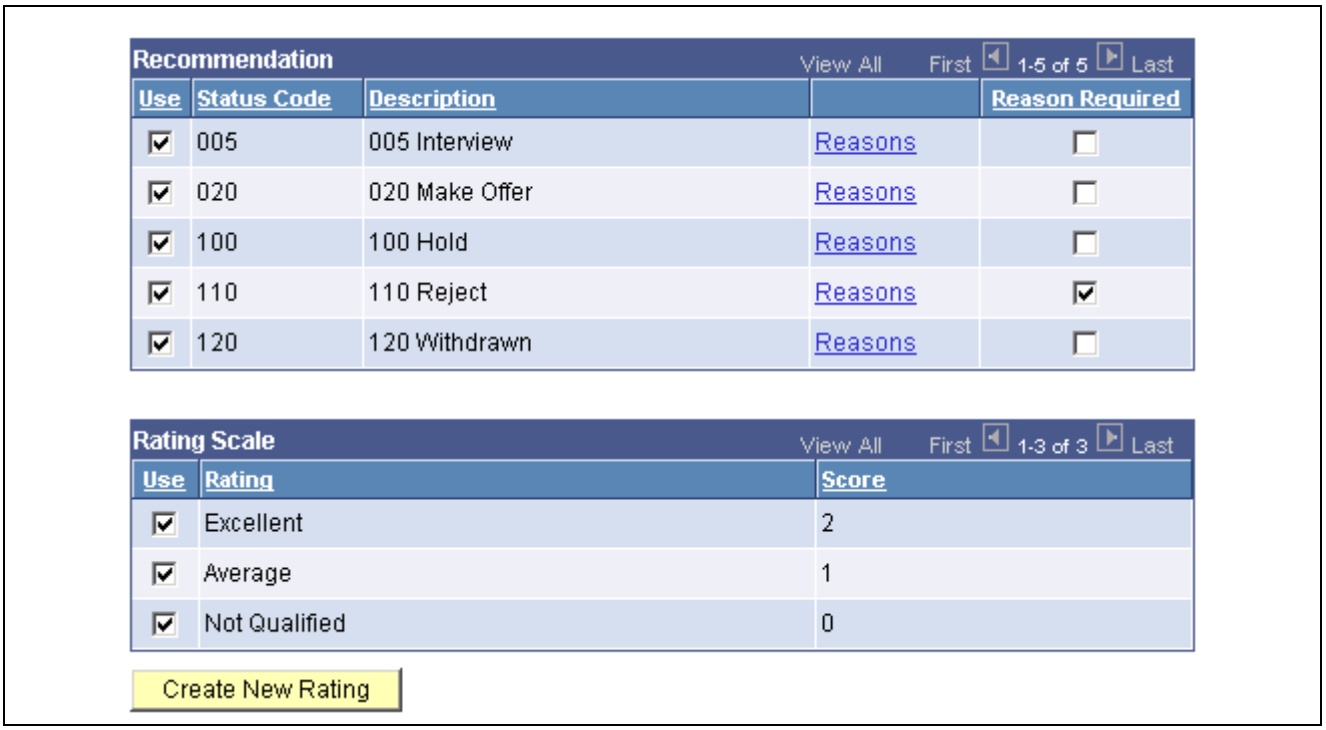
Page Name	Object Name	Navigation	Usage
Interview Evaluation Template	HRS_INT_EVL_DFN	Set Up HRMS, Product Related, Recruiting, Templates, Interview Evaluation Template, Interview Evaluation Template	Create an interview evaluation template.

Creating an Interview Evaluation Template

Access the Interview Evaluation Template page.



Interview Evaluation Template page (1 of 2)



Interview Evaluation Template page (2 of 2)

Evaluation Categories

Evaluation Category Select an evaluation category that you want included in the interview evaluation. Evaluation categories are created on the Interview Evaluation Category page.

Create New Category Click to display the Interview Evaluation Category page.

Recommendation

Use Select if you want this status used as an available recommendation on the interview evaluation form. Status codes are defined on the Status Effects page. The system automatically lists the status values that are defined for the interview recruitment area. If the default statuses are modified, the system displays the company's statuses here.

Reasons Click to access the Recommendation Reasons page, where you can view the reasons that are associated with the status values in Description. Select the reasons that you want to include on the evaluation form. Interviewers select a reason that explains their recommendation

Reasons Required Select if you want interviewers to select an interview reason when they select the interview status value on the evaluation form. Interview reasons are defined on the Status/Reason Definition page.

See Chapter 12, "Interviewing Applicants," Completing Interview Evaluations, page 277.

Rating Scale

Use Select if you want to use this rating in the interview evaluation form.

Rating Define the scale that interviewers use to rate applicants in the areas specified in the evaluation categories. The system creates a radio button on the interview evaluation form for each rating that you enter here.

Score Enter the number of points that are associated with the rating that you enter in Description. The system uses this value to determine the overall score of applicants.

Create New Rating Click to display the Interview Evaluation Ratings page.

Setting Up Recruitment Templates

To set up recruitment templates, use the Recruitment Template (HRS_RCRT_TMPL) component.

This section provides an overview of recruitment templates, lists prerequisites, and discusses how to:

- Link templates to recruitment templates.
- Assign segmentation values to recruitment templates.

Understanding Recruitment Templates

Recruitment templates link all the recruiting templates together. The recruitment template is automatically linked to a job opening when you create a job opening. That means that when the link to a recruitment template is made to a job opening, all templates that are assigned to that recruitment template will be used in conjunction with that job opening.

Specific sections are on the job opening template that should coordinate with the sections on the resume template. When you save the recruitment template, the system verifies that when the following sections are included in the job opening template, those same sections are included in the resume template:

- Education and Work Experience.
- Languages.
- Competencies.
- Honors and Awards.
- Licenses and Certificates.
- Memberships.
- Training.

When a mismatch occurs between the two templates, an error message appears and you can cancel to correct the problem or save the recruitment template with the mismatch information.

Prerequisites

Before you define recruitment templates:

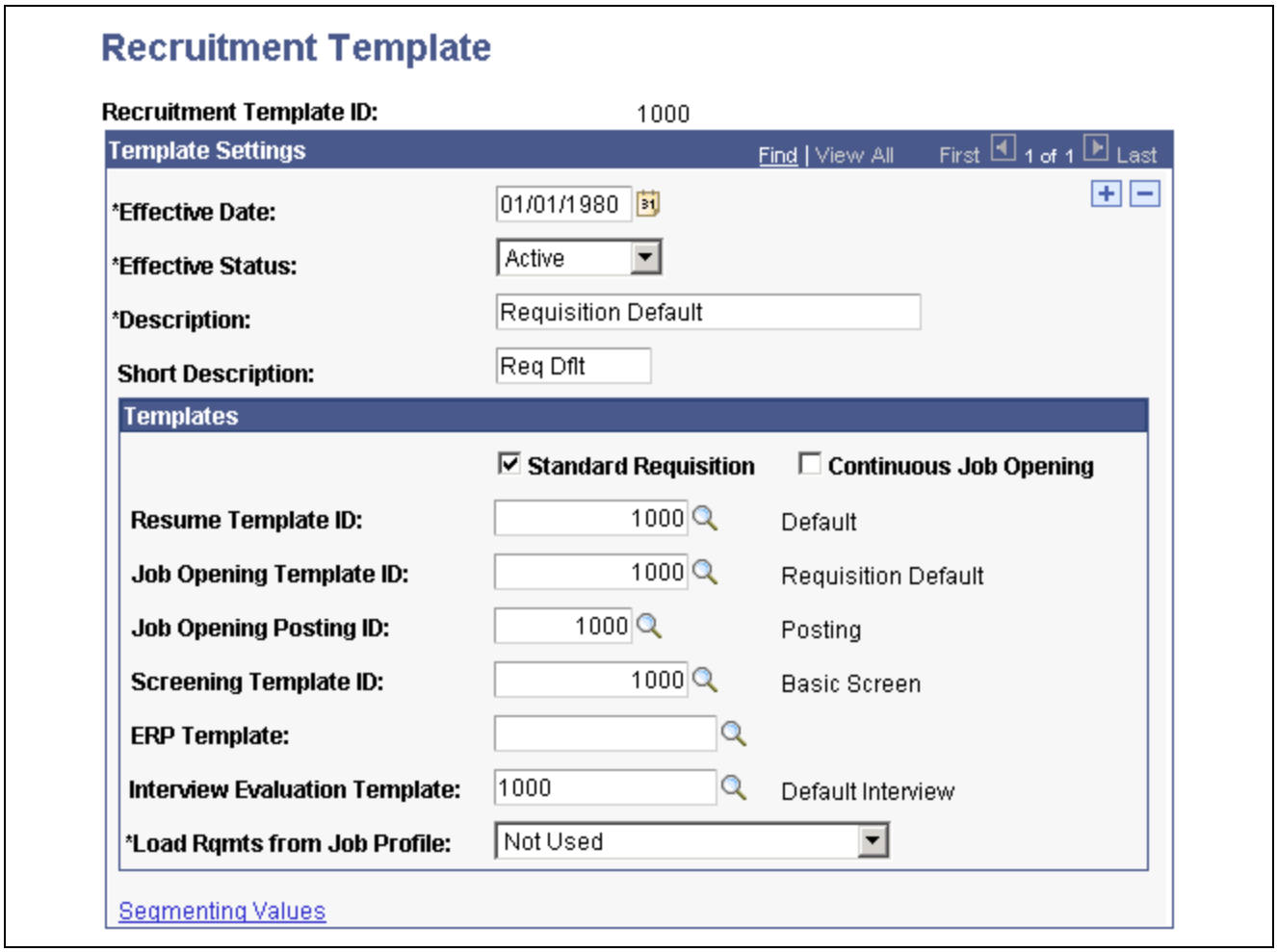
- (Optional) Set up resume templates.
- (Optional) Set up job opening templates.
- (Optional) Set up job posting templates.
- (Optional) Set up screening templates.
- (Optional) Set up interview evaluation templates.
- (Optional) Set up employee referral programs.

Pages Used to Set Up Recruitment Templates

Page Name	Object Name	Navigation	Usage
Recruitment Template	HRS_RCRT_TMPL	Set Up HRMS, Product Related, Recruiting, Templates, Recruitment Template, Recruitment Template	Link templates to recruitment templates.
Segmentation Values	HRS_SEGMENT_SEC	Click the Segmenting Values link on the Recruitment Template page.	Assign segmentation values to recruitment templates.

Linking Templates to Recruitment Templates

Access the Recruitment Template page.



Recruitment Template page

Templates

Standard Requisition Select if this template is to be used for job openings that are designated as standard requisitions.

Continuous Job Posting Select if this template is to be used for job openings that are designated as continuous job postings.

Resume Template ID Select the resume template that you want to link to this recruitment template.

Job Opening Template ID Select the job opening template that you want to link to this recruitment template.

Job Opening Posting ID Select the job opening posting template that you want to link to this recruitment template.

Screening Template ID Select the screening template that you want to link to this recruitment template.

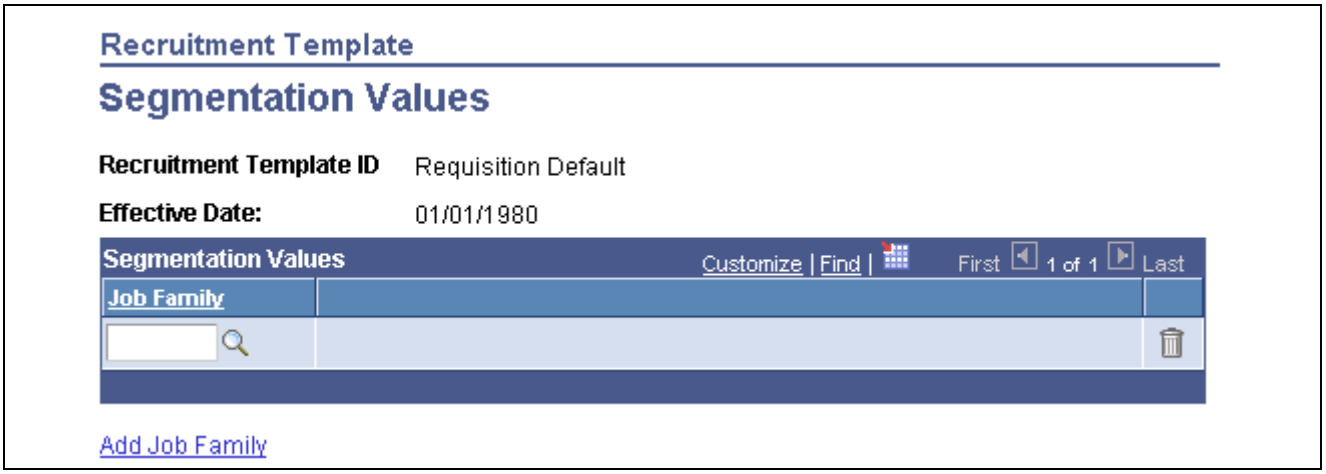
ERP (employee referral program template) Select the employee referral program that you want to link to this recruitment template. Define employee referral programs by using the Employee Referral Program (HRS_REF_PGM) component.

See Chapter 7, “Creating Employee Referral Programs,” page 129.

Interview Evaluation Template	Select the interview evaluation template that you want to link to this recruitment template.
Load Rqmts from Job Profile (load requirements from job profile)	Select the table with which you have associated a job profile ID from which you want the system to pull the competencies, responsibilities, and qualifications that are linked to that job profile. Values are: • *Job Code* • *Job Family* • *Position* • *Sal Grade* (salary grade)
Segmenting Values	Click to display the Segmenting Values page.

Assigning Segmentation Values to Recruitment Templates

Access the Segmentation Values page.



Segmentation Values page

The field names that appear on the page depend on the value that you entered in the Template Segmenting Type field on the Installation Options page.

See Chapter 2, "Setting Up the Recruiting Process," Defining Recruiting Installation Defaults, page 6.

Segmentation Values

Select the appropriate segmentation values for the recruitment template. The field that appears as a segmentation value here is determined by the segmenting type that was selected on the Recruiting Installation-Installation Options page. This field determines which recruitment template to use when a user creates a new job opening. The system uses the segmenting value that the user enters at the beginning of the Create New Job Opening process, finds the associated recruitment template, and then associates that Recruitment template with the job opening.

CHAPTER 4

Setting Up Recruiting Statuses

This chapter provides overviews of recruiting statuses and the setup of recruiting statuses, and discusses how to set up recruiting statuses.

Understanding Recruiting Statuses

Recruiting statuses help a recruiter identify the circumstances of an applicant and job opening. PeopleSoft has identified six areas (known as recruitment areas) in which statuses are tracked:

- Job Openings helps identify where to focus efforts regarding a job opening: Is it open, on hold, or closed?
- Applicants helps identify who to act on, and what actions to take.
- Recruitment Summary identifies how far an applicant has progressed in the recruitment process.
- Route identifies whether an applicant has been given to the hiring manager for consideration.
- Interview identifies the progress of an applicant within the interview stage and the interviewers' recommendations.
- Offer identifies the progress of an applicant within the offer stage.

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

For example, when you hire an applicant into a job opening, you want the system to change the applicant's status to hired so that they are no longer considered as a candidate for any other job opening. In turn, you will probably want the status of the job opening to be set to closed so that no other candidates are allowed to submit an application for that job opening.

Note. Setting up status codes is optional. PeopleSoft supplies a set of codes and associated rules for status changes. You should use the delivered statuses and rules.

Understanding the Setup of Recruiting Statuses

The two steps to setting up recruiting statuses are:

1. Define status codes and associated reasons.
2. Define the rules that govern how the statuses are processed.

Define Status Codes and Associated Reasons

The following table identifies the recruitment area and associated statuses that are delivered by PeopleSoft:

Recruitment Area	Purpose	Status Code	Table
Job Opening	Tracks the status of a job opening.	*Draft* *Pending Approval* *Denied* *Open* *Hold* *Filled/Closed* *Canceled*	HRS_JOB_OPENING
Applicant	Tracks the status of an applicant	*Active* *Hired* *Inactive* *Queued*	HRS_APPLICANT

Recruitment Area	Purpose	Status Code	Table
Recruitment Summary	Tracks the disposition of an applicant relative to that applicant's application	*Draft* *Review* *Linked* *Applied* *Screened* *Route* *Interview* *Preliminary Offer Decided* *Offer* *Offer Accepted* *Preliminary Offer Notified* *Preliminary Offer Accepted* *Preliminary Offer Rejected* *Hire Decided* *Ready to Hire* *Hired* *Hold* *Reject* *Withdrawn* *Inactive*	HRS_RCMNT
Route	Tracks the disposition of an applicant relative to that applicant's application	*Routed* *Invite for Interview* *Hold* *Reject* *Withdrawn*	HRS_APP_RTE

Recruitment Area	Purpose	Status Code	Table
Interview	Tracks the disposition of an applicant relative to that applicant's application	*Interview* *Make Offer* *Hold* *Reject* *Withdrawn*	HRS_RCM_INT
Offer	Tracks the disposition of an applicant relative to that applicant's application	*Draft* *Pending Approval* *Denied* *Extend* *Accept* *Acceptance Withdrawn* *Hold* *Offer Rejected* *Offer Withdrawn*	HRS_OFFER

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

For example, the progression for a job opening with a status of Open might be from Open to Hold, Filled/Closed, or Canceled. The system uses the successor information to determine what status code to assign as the next in the progression when a status change is initiated by the system.

Effect of Status Changes

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

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

Recruitment Area	Records Affected	Impact
Recruitment Summary	Hired applicant	Set status to *Hired* for the selected job opening.
Recruitment Summary	Hired applicant's other applications	If the hired applicant is linked to other job openings, set the Recruitment Summary status for those applications to *Reject* and reason code to *Selected for Another Position.*

Recruitment Area	Records Affected	Impact
Recruitment Summary	Other applicants for the job opening	If all the openings for the job opening are filled, set the Recruitment Summary status to *Reject* and reason code to *Another Applicant was Hired.*
Job Requisition	Job Requisition	If all the openings are filled, set the Job Opening Status to *Filled/Closed.*

Note. This table shows the PeopleSoft-delivered rules. However, you can adjust the status codes and rules to suit your organization.

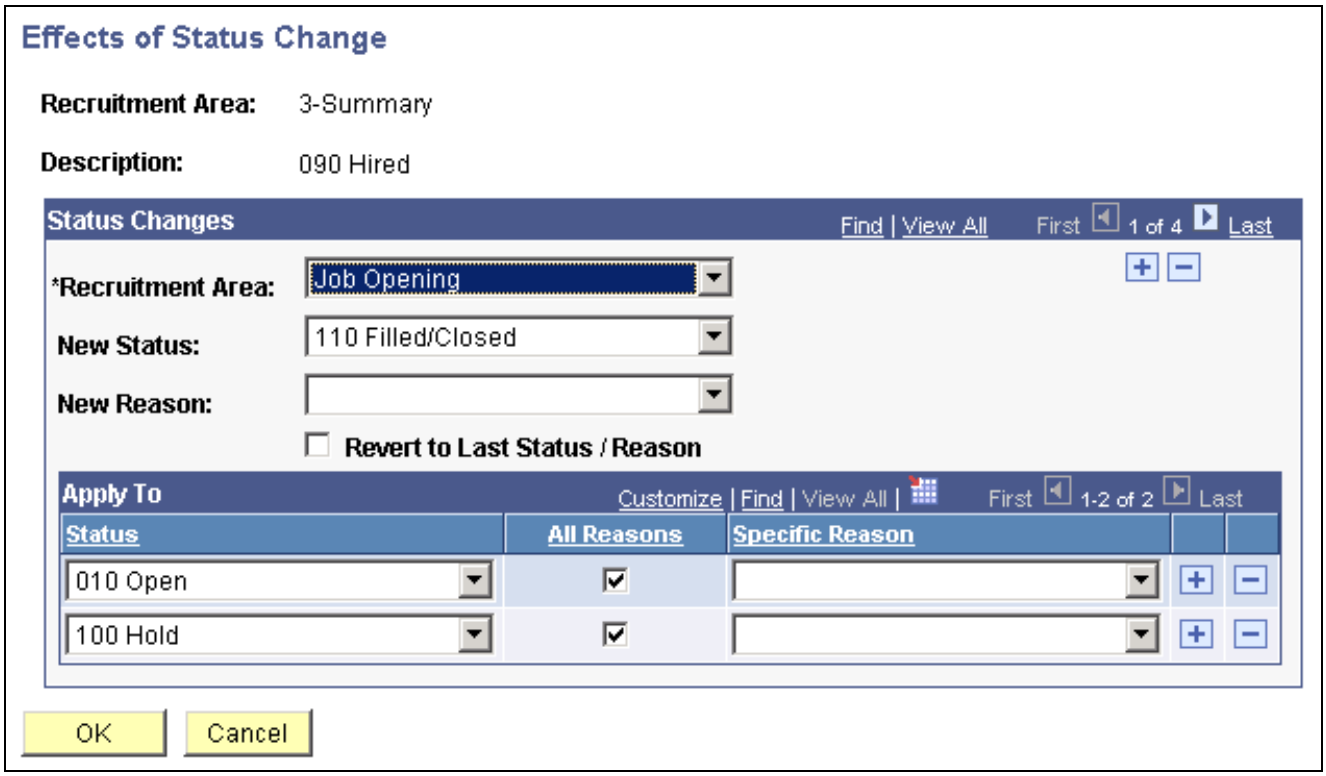
Some status codes don't affect other statuses and there are restrictions on the changes allowed. Changing an applicant's status to *Inactive,* for example, doesn't have an impact on the status of a job requisition. However, it does have an impact on the status of the applicant's open applications. The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

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

For each rule, you define:

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

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



Example of the Effects of Status Change page

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

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

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

Summary of Delivered Recruiting Statuses and Their Effects

The following table summarizes the delivered impact that changing recruiting statuses has on other recruiting areas and statuses:

If the recruitment area equals:	And the status equals:	Then look for statuses equal to:	In this recruitment area:	And change the status - reason to:
Job Opening	*Open*	*Hold*	Recruitment Summary	Last Status - Reason

If the recruitment area equals:	And the status equals:	Then look for statuses equal to:	In this recruitment area:	And change the status - reason to:
Job Opening	*Hold*	*Review* *Linked* *Applied* *Screen* *Route* *Interview* *Offer*	Recruitment Summary	*Hold*
Job Opening	*Filled/Closed*	*Review* *Linked* *Applied* *Screen* *Route* *Interview* *Offer* *Hold*	Recruitment Summary	*Reject - Another Applicant was Hired*
Job Opening	*Canceled*	*Review* *Linked* *Applied* *Screen* *Route* *Interview* *Offer* *Hold*	Recruitment Summary	*Reject - Job Opening Cancelled*
Applicant	*Inactive*	*Review* *Linked* *Applied* *Screen* *Route* *Interview* *Offer* *Hold*	Recruitment Summary for other positions	*Withdrawn*

If the recruitment area equals:	And the status equals:	Then look for statuses equal to:	In this recruitment area:	And change the status - reason to:
Recruitment Summary	*Offer* *Offer Accepted*	*Hold*	Offer	Last Status - Reason
Recruitment Summary	*Hired*	*Open* *Hold*	Job Opening	*Filled/Closed*
Recruitment Summary	*Hired*	*Active*	Applicant	*Hired*
Recruitment Summary	*Hired*	*Review* *Linked* *Applied* *Screen* *Route* *Interview* *Offer* *Ready to Hire* *Hold*	Recruitment Summary for current application and other job openings	*Reject - Selected for Other Position*
Recruitment Summary	*Hired*	*Review* *Linked* *Applied* *Screen* *Route* *Interview* *Offer* *Hold*	Recruitment Summary for other applicants and current job openings	*Reject - Another Applicant was Hired*
Recruitment Summary	*Hold*	*Routed* *Invite for Interview*	Route	*Hold*
Recruitment Summary	*Reject*	*Routed* *Hold*	Route	*Reject*
Recruitment Summary	*Reject*	*Interview* *Hold*	Interview	*Reject*

If the recruitment area equals:	And the status equals:	Then look for statuses equal to:	In this recruitment area:	And change the status - reason to:
Recruitment Summary	*Reject*	*Extend* *Hold*	Offer	*Reject*
Recruitment Summary	*Withdrawn*	*Routed*	Route	*Withdrawn*
Recruitment Summary	*Withdrawn*	*Interview* *Hold*	Interview	*Withdrawn*
Recruitment Summary	*Withdrawn*	*Extend* *Hold*	Offer	*Withdrawn*
Recruitment Summary	*Inactive*	*Extend* *Hold*	Offer	Last Status - Reason
Route	*Routed*	*Review* *Linked* *Applied* *Screen* *Hold*	Recruitment Summary	*Route*
Route	*Invite for Interview*	*Review* *Linked* *Applied* *Screen* *Hold*	Recruitment Summary	*Route*
Route	*Hold*	*Review* *Linked* *Applied* *Screen* *Route*	Recruitment Summary	*Hold*

If the recruitment area equals:	And the status equals:	Then look for statuses equal to:	In this recruitment area:	And change the status - reason to:
Route	*Reject*	*Review* *Linked* *Applied* *Screen* *Route* *Hold*	Recruitment Summary	*Reject*
Route	*Withdrawn*	*Review* *Linked* *Applied* *Screen* *Hold*	Recruitment Summary	*Withdrawn*
Interview	*Interview*	*Review* *Linked* *Applied* *Screen* *Route* *Hold*	Recruitment Summary for current applicant and job opening	*Interview*
Interview	*Make Offer*	*Review* *Linked* *Applied* *Screen* *Route* *Hold*	Recruitment Summary for current applicant and job opening	*Interview*
Interview	*Hold*	*Review* *Linked* *Applied* *Screen* *Route* *Hold*	Recruitment Summary for current applicant and job opening	*Hold*

If the recruitment area equals:	And the status equals:	Then look for statuses equal to:	In this recruitment area:	And change the status - reason to:
Interview	*Reject*	*Review* *Linked* *Applied* *Screen* *Route* *Interview* *Hold*	Recruitment Summary for current applicant and job opening	*Reject*
Interview	*Withdrawn*	*Review* *Linked* *Applied* *Screen* *Route* *Interview* *Hold*	Recruitment Summary for current applicant and job opening	*Withdrawn*
Offer	*Extend*	*Review* *Linked* *Applied* *Screen* *Route* *Interview* *Hold* *Reject - Offer rejected*	Recruitment Summary for current applicant and job opening	*Offer*
Offer	*Accept*	*Review* *Linked* *Applied* *Screen* *Route* *InterviewOffer* *Hold*	Recruitment Summary for current applicant and job opening	*Accepted*

If the recruitment area equals:	And the status equals:	Then look for statuses equal to:	In this recruitment area:	And change the status - reason to:
Offer	*Accept*	*Review* *Linked* *Applied* *Screen* *Route* *InterviewOffer* *Hold*	Recruitment Summary for current applicant and other job openings	*Hold*
Offer	*Accept*	*Review* *Linked* *Applied* *Screen* *Route* *InterviewOffer* *Hold*	Recruitment Summary for other applicants and current job openings	*Hold*
Offer	*Acceptance Withdrawn*	*Review* *Linked* *Applied* *Screen* *Route* *InterviewReady to Hire* *Hold*	Recruitment Summary for current applicant and current job openings	*Offer*
Offer	*Acceptance Withdrawn*	*Hold*	Recruitment Summary for current applicant and other job openings	Last Status - Reason
Offer	*Acceptance Withdrawn*	*Hold*	Recruitment Summary for: • Current applicant and other job openings. • Other applicants and current job opening.	Last Status - Reason

If the recruitment area equals:	And the status equals:	Then look for statuses equal to:	In this recruitment area:	And change the status - reason to:
Offer	*Hold*	*Hold*	Recruitment Summary for current applicant and other job openings	Last Status - Reason
Offer	*Offer Rejected*	*Review* *Linked* *Applied* *Screen* *Route* *InterviewOffer* *Hold*	Recruitment Summary for current applicant and other job openings	*Reject - Offer rejected*
Offer	*Offer Withdrawn*	*Review* *Linked* *Applied* *Screen* *Route* *InterviewOffer* *Hold*	Recruitment Summary for current applicant and other job openings	*Withdrawn*

Setting Up Recruiting Statuses

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

This section discusses how to:

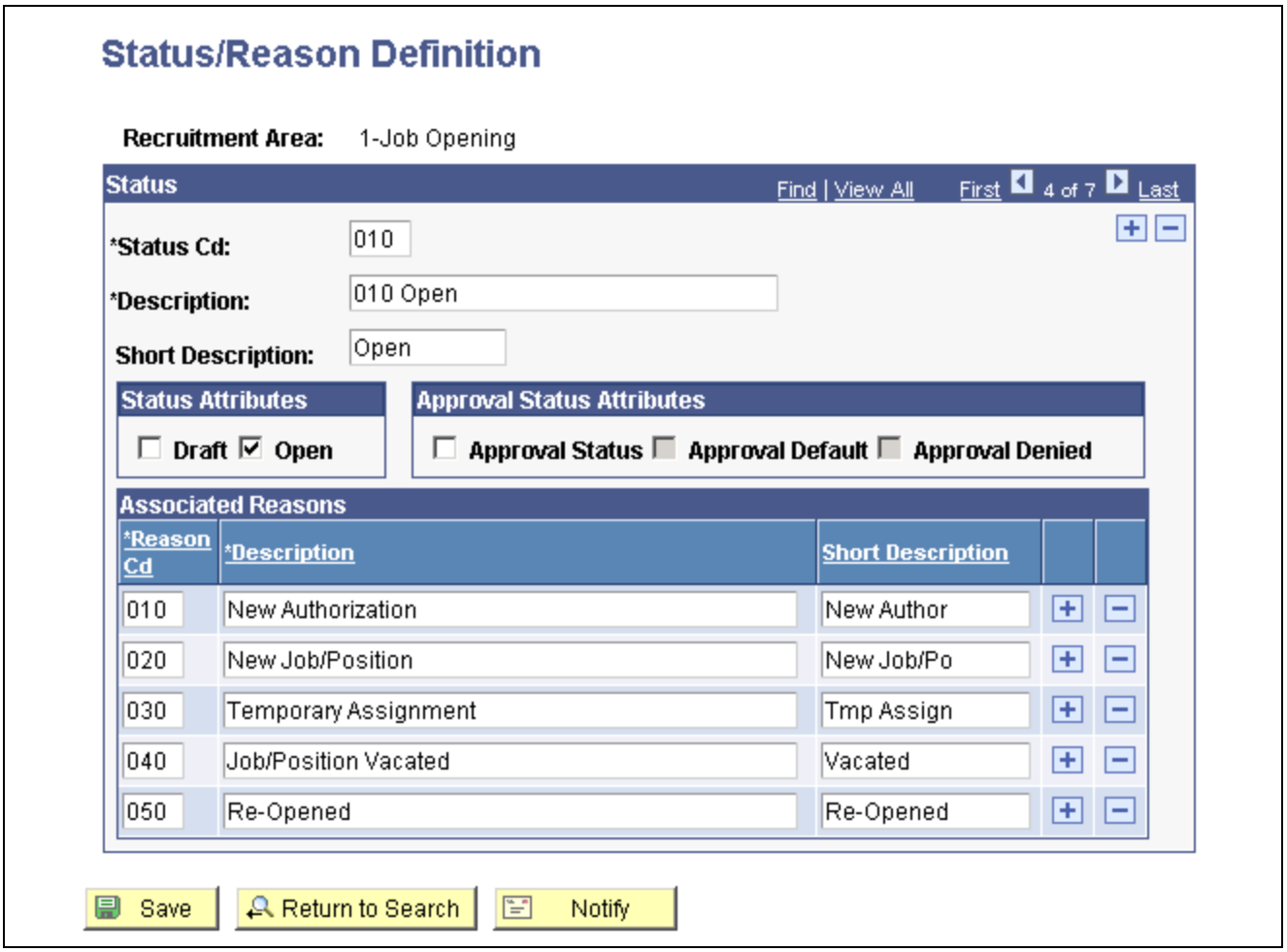
- Define statuses and reason codes.
- Set up recruitment rules.
- Define successors.
- Define the effects of status changes.

Pages Used to Set Up Recruiting Statuses

Page Name	Object Name	Navigation	Usage
Status/Reason Definition	HRS_STS_DFN	Set Up HRMS, Product Related, Recruiting, Status Reason, Status/Reason Definition	Define status values and associated reasons.
Recruitment Area Rules	HRS_STS_AREA	Set Up HRMS, Product Related, Recruiting, Status Area, Recruitment Area Rules	Set up recruitment rules.
Status Successors	HRS_STS_SUCC_TBL	Click the Successors link on the Recruitment Area Rules page.	Define the progression from one status code to another.
Effects of Status Change	HRS_STS_EFF_TBL	Click the Effects of Status Change link on the Recruitment Area Rules page.	Define the effects of status changes.

Defining Statuses and Reasons Codes

Access the Status/Reason Definition page.



Status/Reason Definition page

Status Identifies the status code that is associated with the recruitment area.

Status Attributes Select the attribute that determines whether job openings with this status code are:

- Draft: The job opening is considered work-in-progress and is not yet available.
- Open: The job opening is active and available.

Approval Status Attributes Selecting any of the approval status attributes determines whether the status is an approval status.

- Approval Status: This makes the status an approval status.
- Approval Default: Determines whether the status should be the default for approval statuses.
- Approval Denied: Indicates that approvals go no further in the approval process.

Note. These fields are not available if Draft is selected in the Status Attributes group box.

Associated Reasons Enter the reason codes and descriptions for the status code.

Setting Up Recruitment Rules

Access the Recruitment Area Rules page.



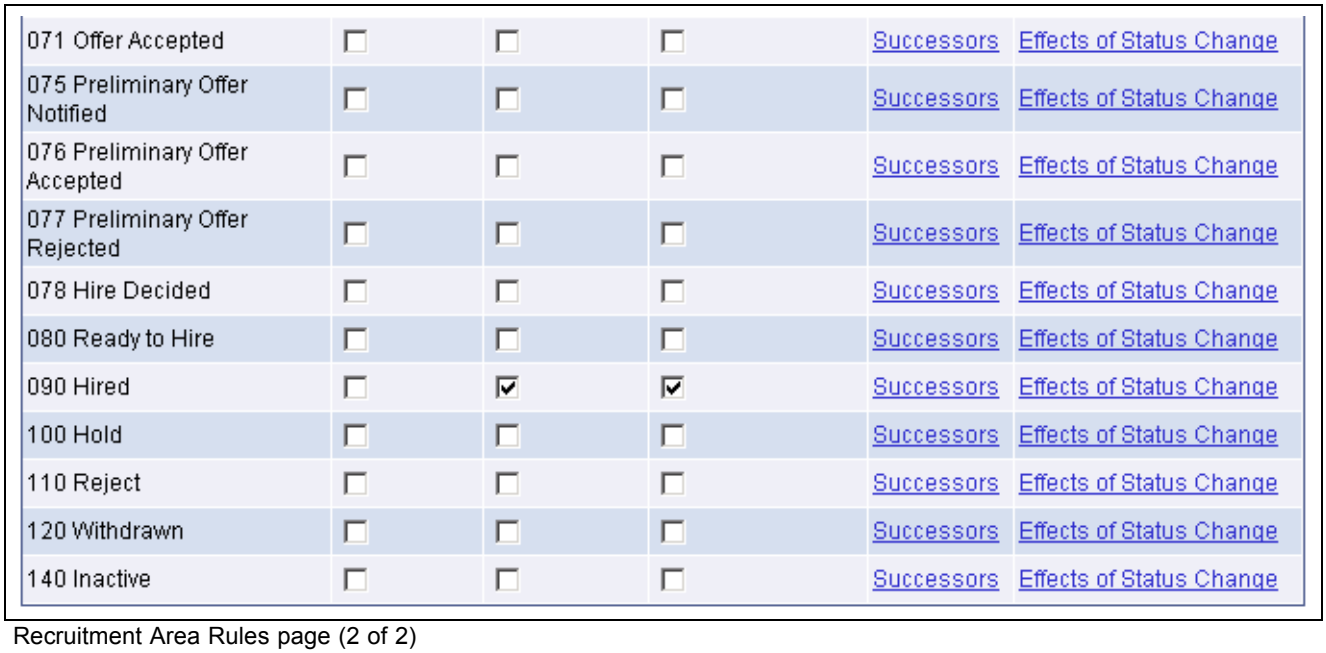
Recruitment Area Rules

Recruitment Area: 3-Recruitment Summary

Define Recruitment Area Rules — Customize | Find | First 1-20 of 20 Last

Description	Default	Complete	Notification		
005 Draft	☐	☐	☐	Successors	Effects of Status Change
010 Review	☐	☐	☐	Successors	Effects of Status Change
015 Linked	☐	☐	☐	Successors	Effects of Status Change
020 Applied	☑	☐	☐	Successors	Effects of Status Change
030 Screen	☐	☐	☐	Successors	Effects of Status Change
050 Route	☐	☐	☐	Successors	Effects of Status Change
060 Interview	☐	☐	☐	Successors	Effects of Status Change
069 Preliminary Offer Decided	☐	☐	☐	Successors	Effects of Status Change
070 Offer	☐	☐	☐	Successors	Effects of Status Change

Recruitment Area Rules page (1 of 2)



071 Offer Accepted	☐	☐	☐	Successors	Effects of Status Change
075 Preliminary Offer Notified	☐	☐	☐	Successors	Effects of Status Change
076 Preliminary Offer Accepted	☐	☐	☐	Successors	Effects of Status Change
077 Preliminary Offer Rejected	☐	☐	☐	Successors	Effects of Status Change
078 Hire Decided	☐	☐	☐	Successors	Effects of Status Change
080 Ready to Hire	☐	☐	☐	Successors	Effects of Status Change
090 Hired	☐	☑	☑	Successors	Effects of Status Change
100 Hold	☐	☐	☐	Successors	Effects of Status Change
110 Reject	☐	☐	☐	Successors	Effects of Status Change
120 Withdrawn	☐	☐	☐	Successors	Effects of Status Change
140 Inactive	☐	☐	☐	Successors	Effects of Status Change

Recruitment Area Rules page (2 of 2)

Default Select if the status is the first status used in the recruitment area. You can select one status only as the default. The system uses this check box to determine which status to apply initially.

Complete Select if the status indicates the successful completion of the recruitment process. The system uses this check box to determine when an application is ready to move to the next stage in the recruitment process. You can select one status only as the complete status.

This check box should be set up correctly as it affects processing throughout the system.

Notification Select if you want a notification sent to the hiring manager or recruiter when a status change occurs.

For Job Openings, the *JobOpeningStseffct* template is used.

For Applicants, the *ApplicantStsEffct* template is used.

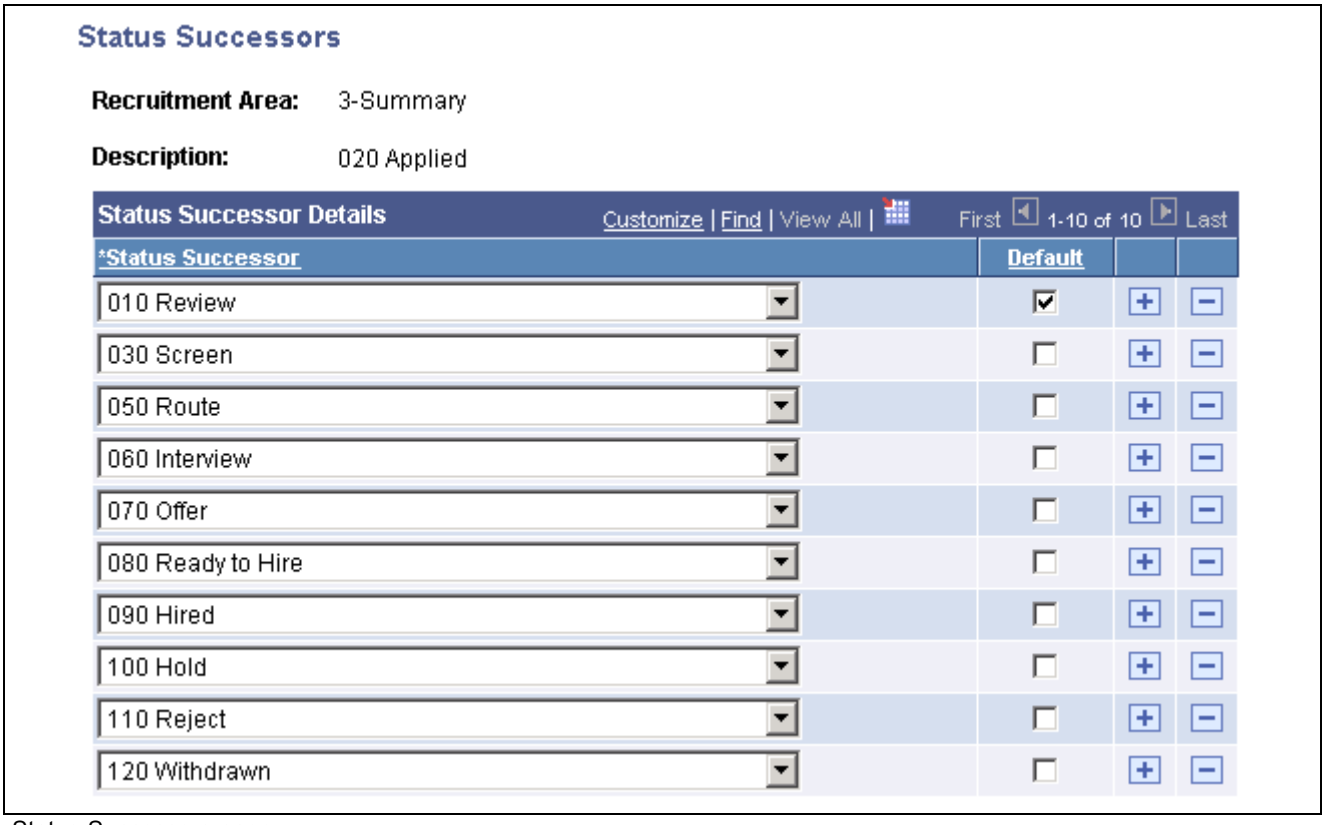
For all other areas, the *OtherStsEffct* template is used.

Successors Click to display the Status Successors page.

Effects of Status Change Click to display the Effects of Status Change page.

Defining Successors

Access the Status Successors page.



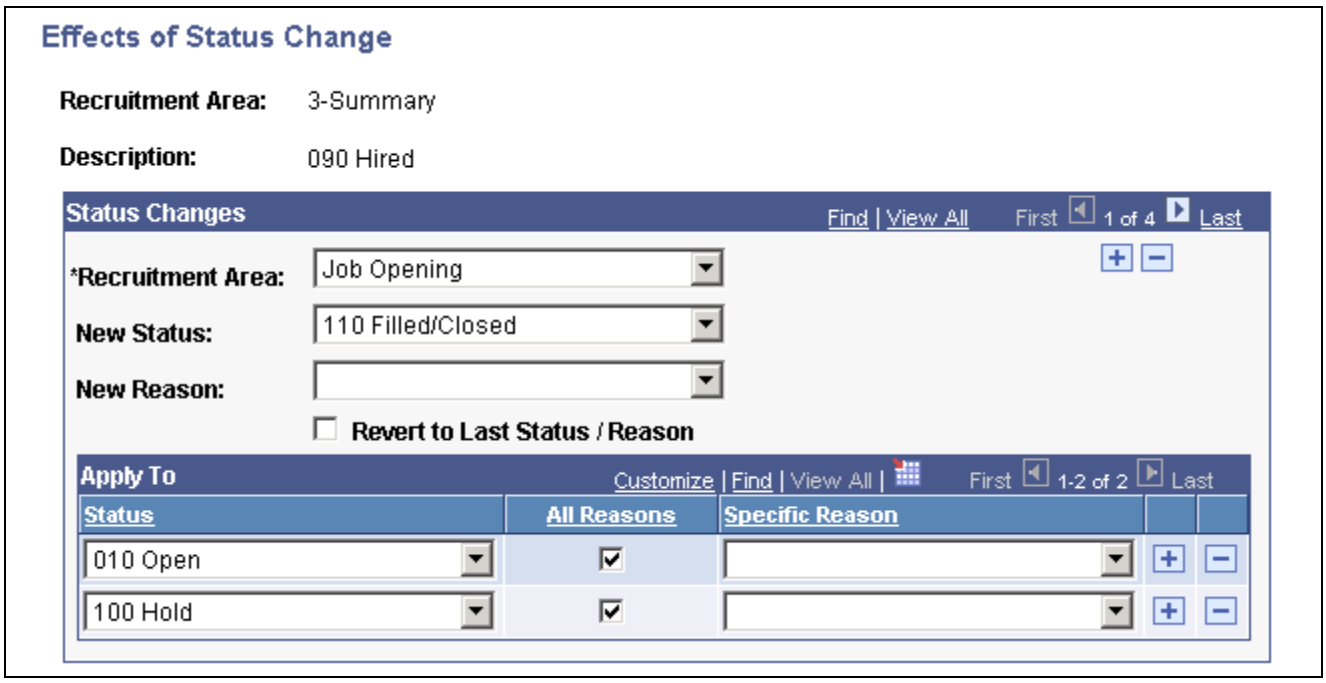
Status Successors page

Status Successor Add the status codes that are valid successors to the status that is shown in Description.

Default Select for the status that is the most likely successor.

Defining the Effects of Status Changes

Access the Effects of Status Change page.



Effects of Status Change page

Status Changes

Recruitment Area Use this field to identify the recruitment area that is affected by the status that is shown in the Description field. If the displayed Description status is in the Recruitment Summary area, you can select other recruitment areas that are affected by the status change.

Otherwise, the system automatically selects *Recruitment Summary.*

Affected Applicant Available in Recruitment Summary area.

Select *Current Applicant - Current Job* if the new code should be applied to the current applicant that is linked to the current job where the status change is being made.

Select *Current Applicant - Other Jobs* if the new status and reason should be applied to the other positions that the current applicant has been linked to.

Select *Other Applicants - Current Job* if the new status and reason should be applied to other applicants that are linked to the same job and no more openings on the job are available.

New Status Select the status that is applied to the affected records.

New Reason Select the reason that is applied to the affected records.

Revert to Last Status/Reason Select if the status reverts to the previous status and reason code that was assigned. Leave the New Status and New Reason fields blank if you select this check box.

Apply To

Status Select the statuses that are affected by the status change. You can choose from the status values that are defined for the recruitment area that you selected in the Status Changes group box.

If the status change should be applied to all reason codes that are associated with the status, select the All Reasons check box. Otherwise, select one reason code in Specific Reason.

CHAPTER 5

Setting Up Third Party Integrations

This chapter provides overviews of third party integrations, job board setup, resume extractor setup, and background screener setup, and discusses how to:

- Set up application classes.
- Set up transaction groups.
- Set up recruiting vendors.
- Set up data mapping.
- Set up autoscreening.
- Set up recruitment sources.
- Set up resume email accounts.
- Review the integration transaction log.

Understanding Third Party Integrations

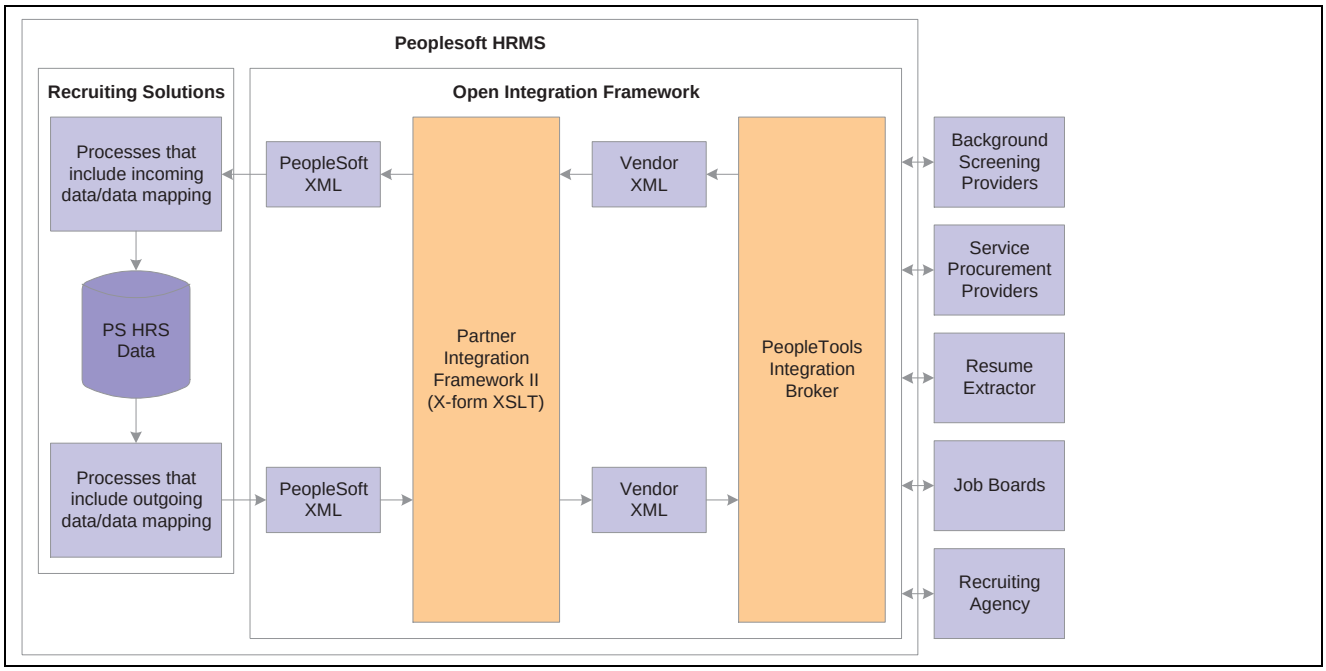
Sharing job opening and candidate information is essential to the success of the recruitment process. PeopleSoft provides an open integration framework that enables you to integrate with:

- Staffing suppliers.
- Resume extractors.
- Background screening providers.

This generic open integration framework enables customers to integrate with any third party provider that they choose. For incoming data, the process is initiated by an incoming message. Using PeopleSoft PeopleTools Integration Broker, the open integration framework process reads the XML document contained in the message and uses the standard XSLT to transform the XML according to the vendor's specifications. Finally, the open integration framework maps the transformed data to the corresponding recruiting data and processes that information.

For outgoing data, a functional process such as posting a job opening or requesting a background screening check initiates the outgoing message. The process reads from the recruiting tables and uses data mapping to create an XML document. This initial XML document may be changed into to an HR-XML document. Another change is then applied to either the initial XML document or to the subsequent HR-XML document, depending on the supplier's needs, to create a final document. The final document is then sent using PeopleSoft PeopleTools Integration Broker

This diagram illustrates the Open Integration Framework:



Open Integration Framework

Understanding Job Board Setup

Job board vendors enable you to post job openings to vendors such as job boards, services procurement providers, and recruitment agencies. To set up job board vendors:

1. Set up the job board vendor.
2. Set up a recruitment source and associate it with the vendor.
3. (Optional) Set up data mapping to support the recruitment source.

Understanding Resume Extractor Setup

Resume extractors enable users to start with a resume in electronic form (such as HTML, PDF, DOC, and so on) and have the information from that resume extracted into more meaningful data. Applicants might embed resumes in email messages as either text or an attachment, and then the resume extractor can process as much information as it can recognize and load data into the PeopleSoft applicant related tables. Similarly, applicants can use their electronic resume to prepopulate their online job applications in PeopleSoft Enterprise Candidate Gateway when they apply for jobs online. Recruiters can also use the extraction process to load data from resumes that they receive into the PeopleSoft applicant related tables. Finally, staffing providers can send resumes that require an extraction process.

To set up resume extractors:

1. Set up the resume extractor.

   Follow the vendor-provided instructions.

2. Set up the resume extractor vendor.

Additional Setup Steps for Different Channels

Applicant resumes can come into the Recruiting Solutions system from one of several channels. The additional setup that you must complete to utilize resume extraction functionality varies slightly depending on the channels that the organization uses to receive resumes. For example, the additional setup that you must complete to receive resumes through email is different from the setup that you must complete to accept resumes from applicants who apply online through Candidate Gateway. However, the setup steps that you use to set up the actual resume extractor vendor are exactly the same for all channels. Therefore, you can set up a single resume extractor to use for all channels, or use a different resume extractor for each.

This table describes the setup steps for each channel:

Step	Apply Online	Email	Open Integration Framework	Resume Load Process
1	Set up a resume extractor (might be optional)	Set up a resume extractor (might be optional)	Set up a resume extractor (might be optional)	Set up a resume extractor (might be optional)
2	Set up a resume extractor vendor	Set up a resume extractor vendor	Set up a resume extractor vendor	Set up a resume extractor vendor
3	Set up a site	Set up an email server and email account to receive resumes	Set up a job board vendor	N/A
4	N/A	Set up an email node definition	N/A	N/A
5	N/A	Set up an email account	N/A	N/A
6	(Optional) Set up Marketing type recruitment sources	Set up a Vendor type recruitment source	Set up a Vendor type recruitment source	(Optional) Set up Marketing type recruitment sources
7	(Optional) Create data mapping assignment for site	(Optional) Create data mapping assignment for recruitment source	(Optional) Create data mapping assignment for recruitment source	(Optional) Create data mapping assignment for recruitment source

Note. Step one might be optional because although an organization can set up and maintain a resume extractor locally, some resume extractor providers might want to set up and maintain the resume extractor remotely. Whether the step is optional depends on the agreement between the resume extractor provider and the organization.

Understanding Background Screener Setup

Background screeners enable recruiters or managers to request formal background checks on applicants that are nearing completion of the recruitment process and are about to be hired. To set up background screeners:

1. Set up pre-employment vendors.
2. (Optional) Set up data mapping to support the pre-employment vendor.

Setting Up Application Classes

To set up application class types, use the Application Class Type (HRS_ACTYPE) and Application Classes Registry (HRS_APPCLASS) components.

This section provides an overview of application classes and discusses how to:

- Define application class types.
- Register an application class.

Understanding Application Classes

PeopleSoft application classes enable developers to create code to drive specific business processes. However, the application classes do not deliver an easy-to-understand description field nor easy-to-classify application classes. The application class types and registry enable developers to set up easy-to-understand descriptions for application classes and to classify them for easy prompt filtering and selection.

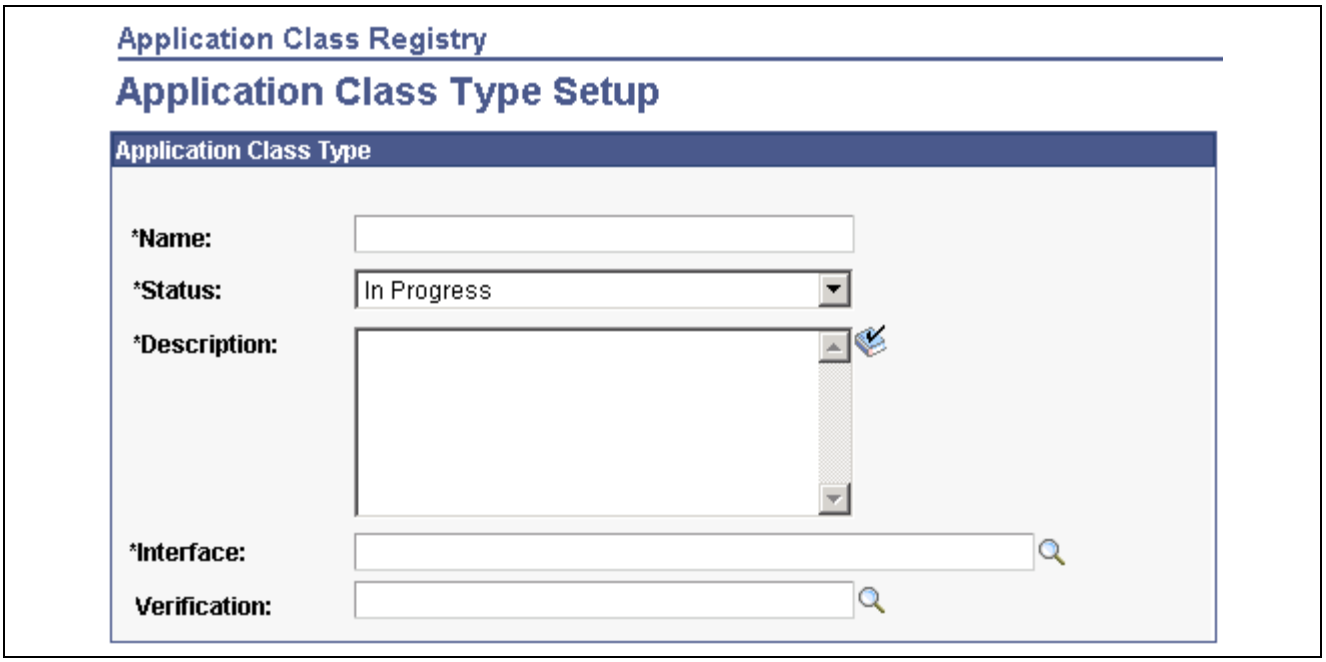
For example, without the registry, users would need to select the correct application class from a long list of application class names such as Extension Application Class HRS_HROI:Components:CompCounter or HRS_HROI:Components:HRS_HROI_LOG. Many of the listed items would not even be applicable and the users would be responsible to know which classes are appropriate for their needs. With the application class type and registry, users select from a more user-friendly list. For example, to select an autoscreening application class, users would need to select an application class from a list that only displays relevant application classes with names such as Email Verification or Default Status - Always Fail that could also display an associated description.

Pages Used to Set Up Application Classes

Page Name	Object Name	Navigation	Usage
Application Class Registry - Application Class Type Setup	HRS_ACTYPE	Set Up HRMS, Product Related, Recruiting, Utilities, Application Class Types, Application Class Registry - Application Class Type Setup	Define application class types.
Application Class Registry - Application Class Setup	HRS_APPCLASS	Set Up HRMS, Product Related, Recruiting, Utilities, Application Class Registry, Application Class Registry - Application Class Type Setup	Register an application class.

Defining Application Class Types

Access the Application Class Registry - Application Class Type Setup page.



Application Class Registry - Application Class Type Setup page

Name Enter a name that describes this application class type.

Status Select a status. Values are:

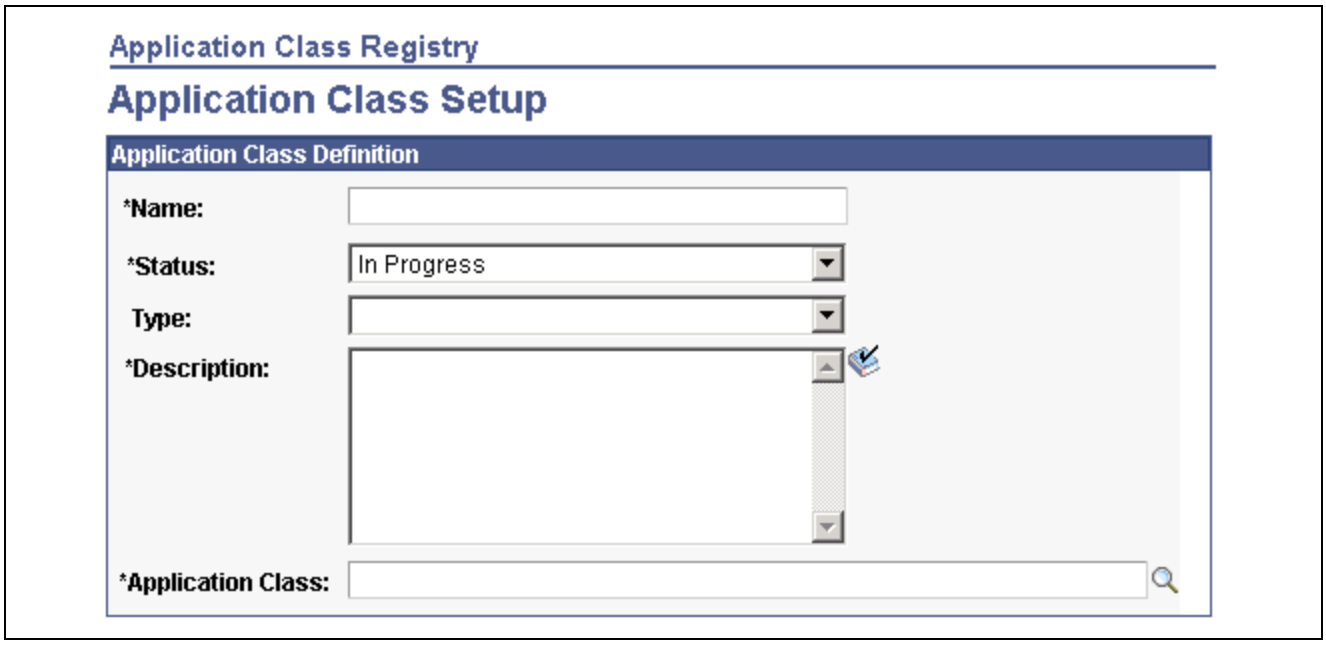
- *Active*
- *Deprecated*
- *In Progress*
- *Retired*

Interface Select the PeopleTools application class interface that application classes must implement to be added as valid application classes of that type.

Verification Select the registered application class that will be used to validate that application classes meet the type requirement.

Registering an Application Class

Access the Application Class Registry - Application Class Setup page.



Application Class Registry - Application Class Setup page

Name Enter a name that describes this application class.

Status Select a status. Values are:

- *Active*
- *Deprecated*
- *In Progress*
- *Retired*

Type Select the application class type. This determines which interface and verification is used to validate that the application class that you select in the Applicant Class field meets the standard for the type.

Description Enter a description that describes the application class for the given type.

Application Class Select an application class definition.

Setting Up Transaction Groups

To set up transaction groups, use the Transaction Group (HRS_TGROUP) component.

This section provides an overview of transaction groups and discusses how to set up transaction groups.

Understanding Transaction Groups

PeopleSoft delivers three transaction groups, one for each type of recruitment vendor:

- ResumeExtractor.
- PreEmployment.

- JobBoard.

You do not need to create any transaction groups unless you plan to use the Open Integration Framework to integrate with vendors other than resume extractors, background screening providers, or job boards.

A transaction group defines a group of transactions that a particular vendor uses. In addition, the Extension Configuration group box determines what menu bar, item, and page users are directed to from the Vendor Setup (HRS_VENDOR_SETUP) component when additional setup options are required to complete a vendor definition. The AppClass (application class) field in the Extension Configuration group box on the Open Integration Framework - Transaction Group Setup page determines the processes that the XML added to the complete schema in the Extension XML field. These options are created on a PeopleTools page and then the details of that page are set up in this group box. For example, the PreEmployment transaction group requires additional setup beyond the standard vendor options.

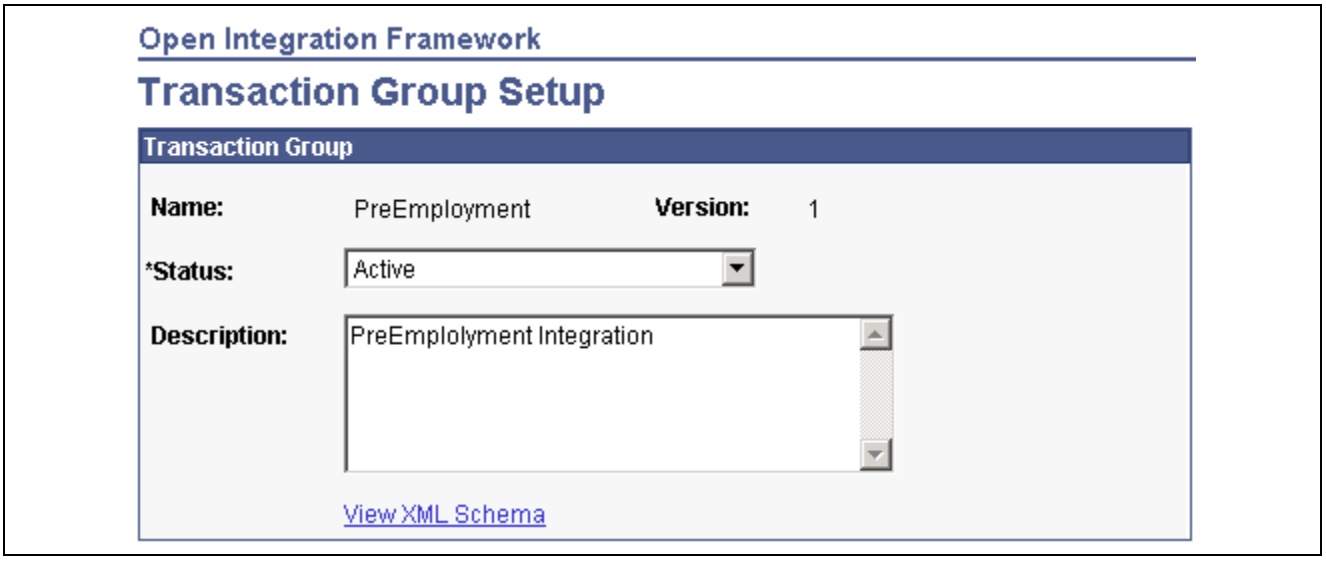
Much of the schema can be automatically generated based on the transactions and other data on the XML schema that is unique to a particular transaction group.

Pages Used to Set Up Transaction Groups

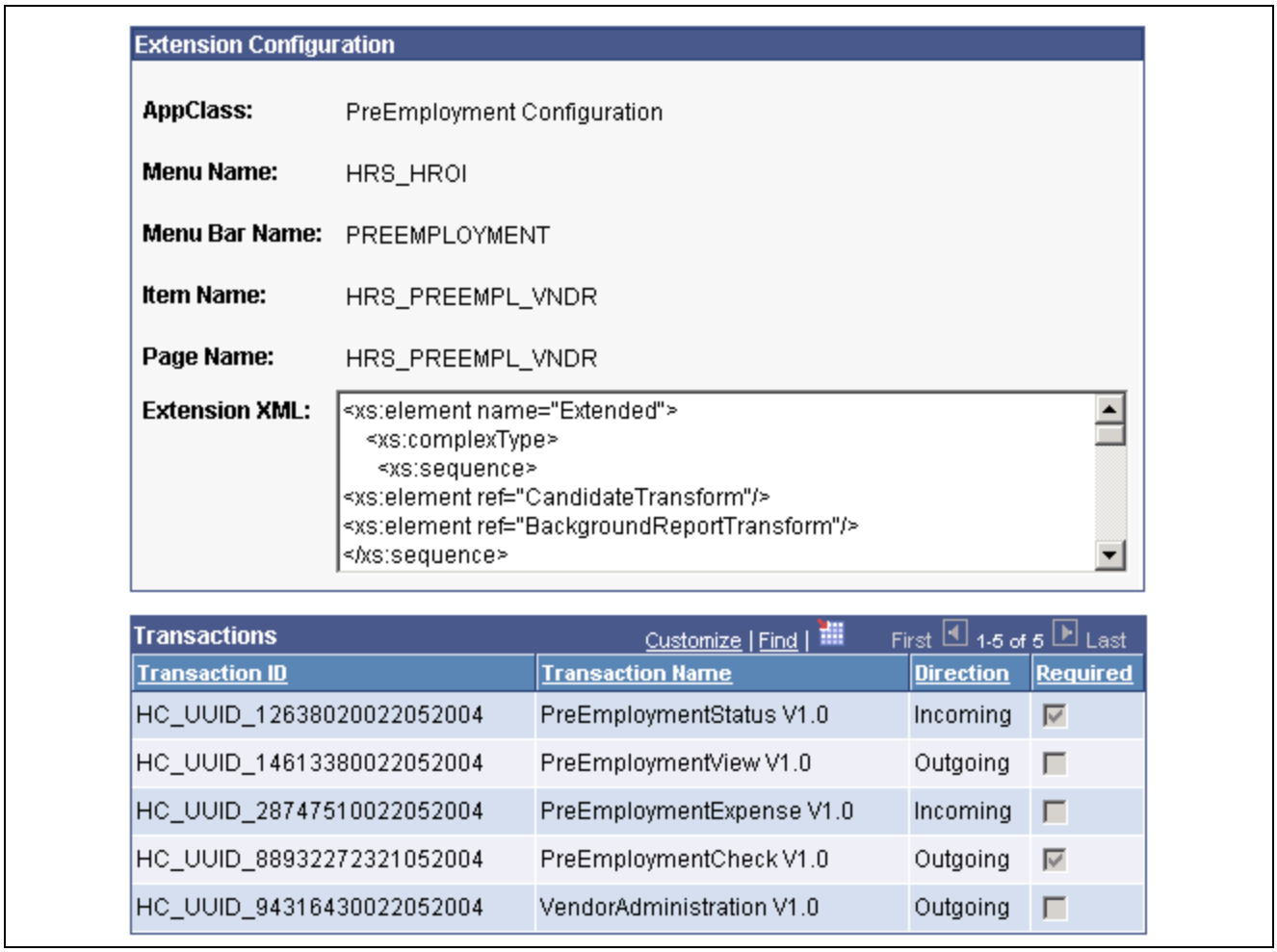
Page Name	Object Name	Navigation	Usage
Open Integration Framework - Transaction Group Setup	HRS_TGROUP	Set Up HRMS, Product Related, Recruiting, Utilities, Transaction Group, Open Integration Framework - Transaction Group Setup	Set up transaction groups to use with vendor integration points.
XML Schema	HRS_TGROUP_P2	Click the View XML Schema link on the Open Integration Framework - Transaction Group Setup page.	View the XML schema for the transaction group.

Setting Up Transaction Groups

Access the Open Integration Framework - Transaction Group Setup page.



Open Integration Framework - Transaction Group Setup page (1 of 2)



Open Integration Framework - Transaction Group Setup page (2 of 2)

Setting Up Recruiting Vendors

To set up recruiting vendors, use the Vendor Setup (HRS_VENDOR_SETUP) component.

This section provides an overview of how to set up recruiting vendors and discusses how to:

- Load a vendor configuration file.
- Define settings for pre-employment vendors.

Understanding How to Set Up Recruiting Vendors

Regardless of the type of recruiting vendor you are going to set up, you must complete some common tasks:

1. Set up your local gateway using PeopleTools Integration Broker.

   See *Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Integration Testing Utilities and Tools*
2. Verify security and class setup.

PeopleSoft delivers the permission list HCCPRS1010 and the role RS Technical Administrator for this purpose. To have full access to all integration components, the permission list must be linked to the menu HRS_HROI.

3. Load the vendor-provided configuration file.

   Work with the vendor to obtain this file.

4. (Optional) Map competencies, accomplishments, and postal codes from the vendor to PeopleSoft Recruiting Solutions.

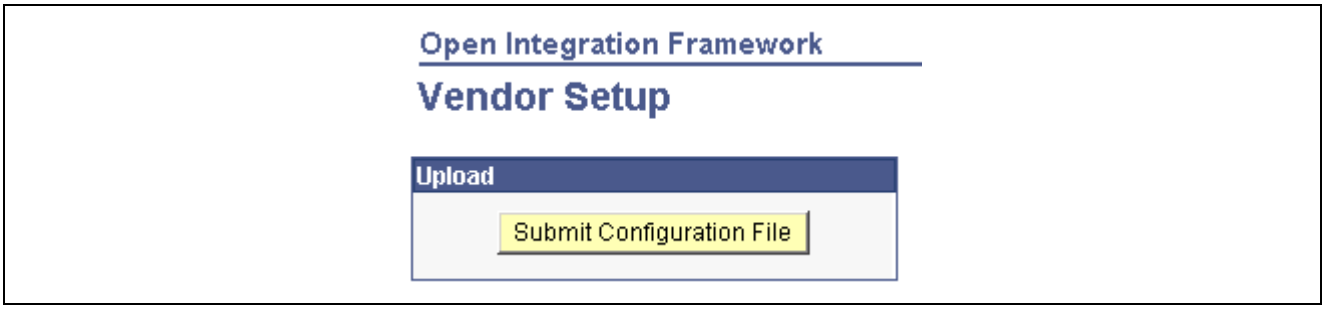
   Although data mapping is optional, it makes integration much more effective.

Pages Used to Set Up Recruiting Vendors

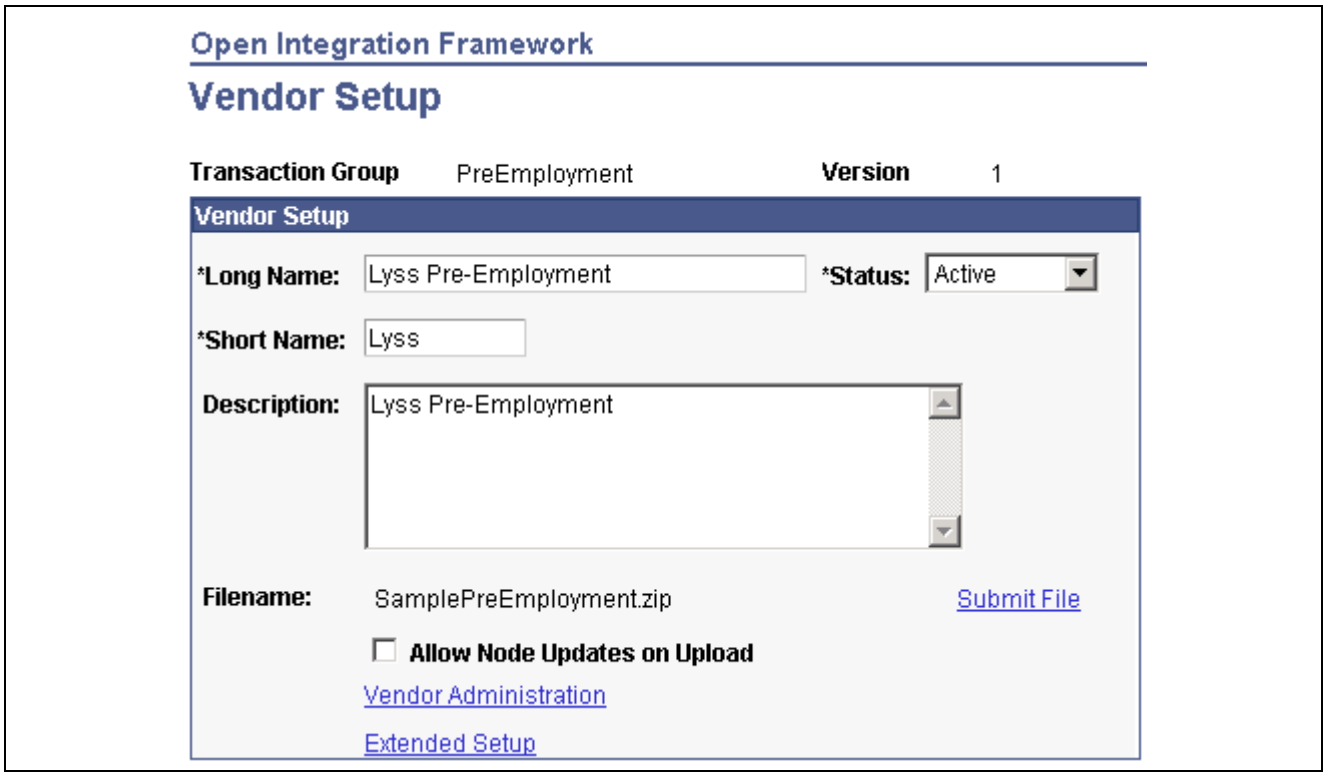
Page Name	Object Name	Navigation	Usage
Open Integration Framework - Vendor Setup	HRS_VENDOR_FILE	Set Up HRMS, Product Related, Recruiting, Integration, Vendor, Open Integration Framework - Vendor Setup	Load a vendor configuration file.
Open Integration Framework - Pre-Employment Vendor Setup	HRS_PREEMPL_VNDR	Select the Extended Setup link on the Open Integration Framework - Vendor Setup page	Define settings for pre-employment vendors.

Loading a Vendor Configuration File

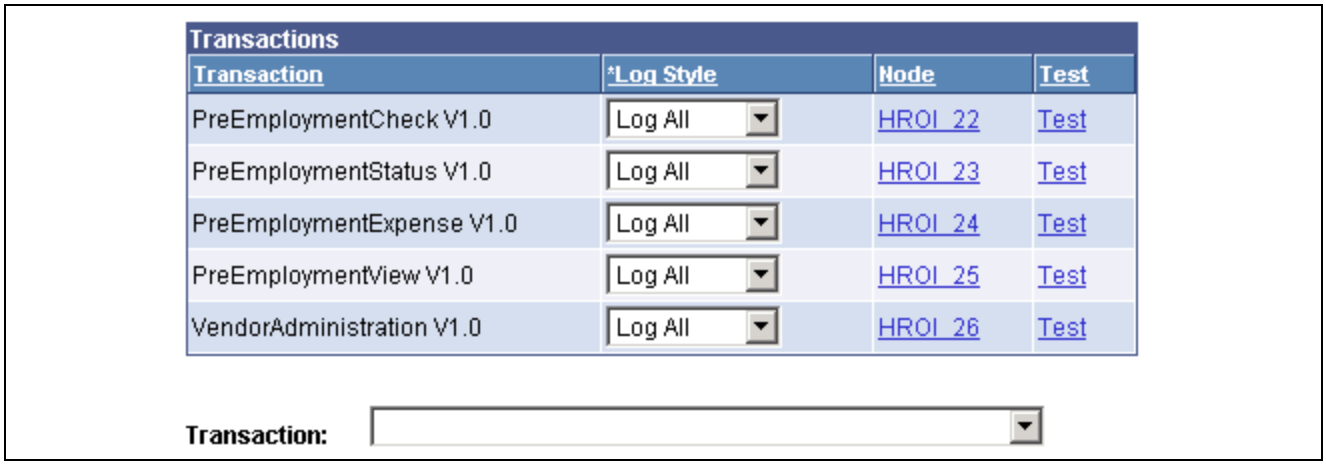
Access the Open Integration Framework - Vendor Setup page.



Open Integration Framework - Vendor Setup page (1 of 3)



Open Integration Framework - Vendor Setup page (2 of 3)



Open Integration Framework - Vendor Setup page (3 of 3)

Use this page to locate the vendor's configuration file and upload the file. The Vendor Setup and Transactions group boxes are automatically populated with the information that is provided in the configuration file. The transactions that appear in the Transactions group box are those that are defined on the Open Integration Framework - Transaction Group Setup page for the transaction group that is associated with the vendor configuration file.

Status To activate the vendor, select *Active*.

Vendor Administration Click to access the vendor's administration page. Not all vendors will support this option.

Extended Setup Click to access the Open Integration Framework - Pre-Employment Vendor Setup page, where you can define settings for pre-employment vendors. This

link appears only for vendors in the PreEmployment transaction group, based on the setup in the Extension Configuration group box on the Open Integration Framework - Transaction Group Setup page.

Allow Node Updates on Upload The node definitions are set up by the process of loading the vendor configuration file. If subsequent loads of the file are necessary (perhaps a customer gets an updated configuration file from the vendor), the Allow Node Updates on Upload check box enables the user to update the node definition or keep allowing the nodes to be updated.

Log Style Defines when to log messages on the Open Integration Framework - Integration Log page. Values are:

Log All: An entry is entered into the integration log every time a message is received from the vendor.

Never Log: An entry is never made to the integration log.

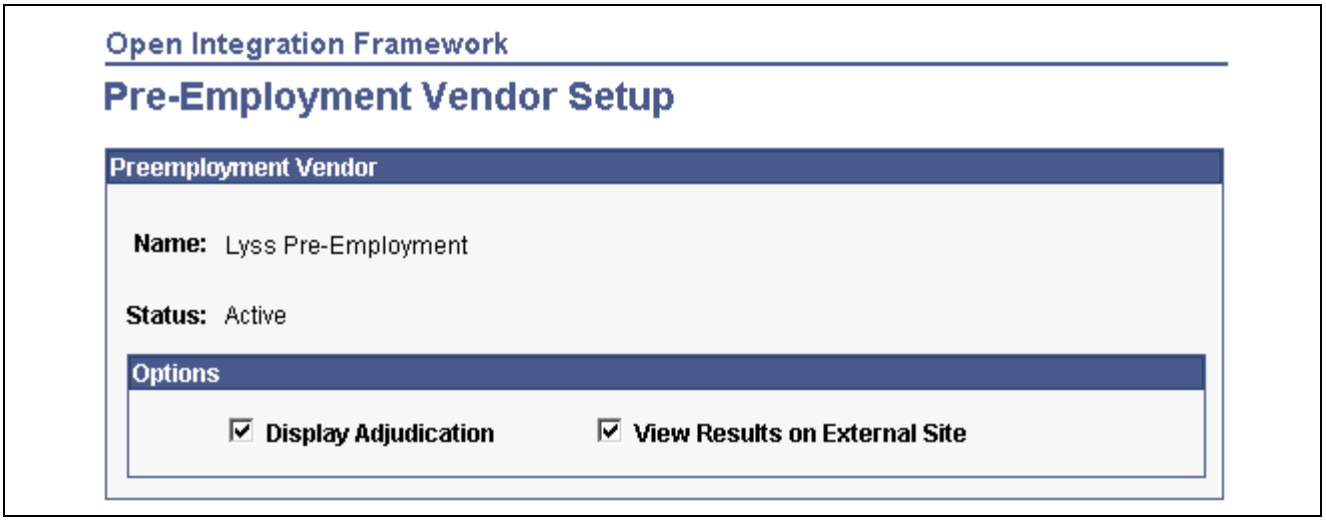
On Error: An entry is made to the integration log only when an error occurs.

Node Displays the node name that is associated with the vendor's transaction. These node names are dynamically created. Click a node link to access the Connectors page.

Test Click to test the integration setup for all outgoing messages. The Test links do not apply to incoming transactions.

Defining Settings for Pre-Employment Vendors

Access the Open Integration Framework - Pre-Employment Vendor Setup page.



Open Integration Framework - Pre-Employment Vendor Setup page

Display Adjudication Select to make the adjudication status visible to managers, recruiters, and recruiting administrators on the Manage Applicants - Pre-employment Check and Pre-employment Check - Pre-employment Check Details pages. If you clear this field, the system displays *Not Displayed* in the Adjudication Status fields on these pages.

View Results on External Site Select to make the View Results link on the Pre-employment Check - Pre-employment Check Details page visible to managers, recruiters, and

recruiting administrators. Users click the View Results link to access a detailed page of the pre-employment inquiry on the vendor site.

Setting Up Data Mapping

To set up data mapping, use the Data Mapping Assignments (HRS_DM_MAP_SETUP), Category Setup (HRS_DM_CAT_SETUP), Data Mapping (HRS_DM_MAPPING), and Postal Map (HRS_HRXML_POSTAL) components.

This section provides an overview of data mapping and discusses how to:

- Create data mapping assignments.
- Set up categories.
- View key lists.
- View value lists.
- Map unmapped data.
- Map keys.
- Map values.
- Map inbound postal information.
- Map outbound postal information.

Understanding Data Mapping

Data mapping enables you to take information coming into your system, run it through an interpreter, and then have it presented to you in a format that fits your system. Data mapping is also used for outgoing messages in a similar fashion. The types of data mapping are:

- Assignments and categories.
- Postal.
- Predefined mappings.

Assignments and Categories

Data mapping assignments define how the system translates the words or phrases coming into the system to the words or phrases used by your system. You can set up data mapping definitions based on site, recruitment source, vendor, or the default All mapping. You can also have just one data mapping definition to everything coming into your system.

Data mapping categories are data objects that are used by the assigned maps to define how data is mapped. PeopleSoft delivers 11 data mapping categories:

- Competencies.
- Honors and Awards.
- Language (accomplishment).
- Licenses and Certifications.
- Memberships.

- Degrees.
- Major.
- School.
- Country.
- State/Providence.
- Language (translate values).

These delivered data mapping categories were created to support Manage External Postings, Resume Management, and Background Screening. You can create a new data mapping category; however, some development work is necessary to define an appropriate application class.

For example, suppose a user creates a new entry in the School table for Stanford University with School ID = Stanford. This alone is not enough to map school data to or from the school ID Stanford. To begin mapping to or from this ID, the user must first run the synchronization process after creating the entry for Stanford University. To enable users to more efficiently process the synchronization for data mappings, PeopleSoft delivers a batch process that enables users to synchronize all data mapping categories at the same time. To initiate this process, navigate to PeopleTools, Process Scheduler, System Process Requests and create a new run control. Click the Run button, select a process server, select the Datamapping Sync (HRS_DM_SYNC) process, and click OK.

Postal

When postal information needs to be exchanged between an XML document and a Recruiting Solutions database, decisions of how this exchange occurs must be determined. This determination is at the country level.

Data Mapping Setup Steps

To set up data mapping:

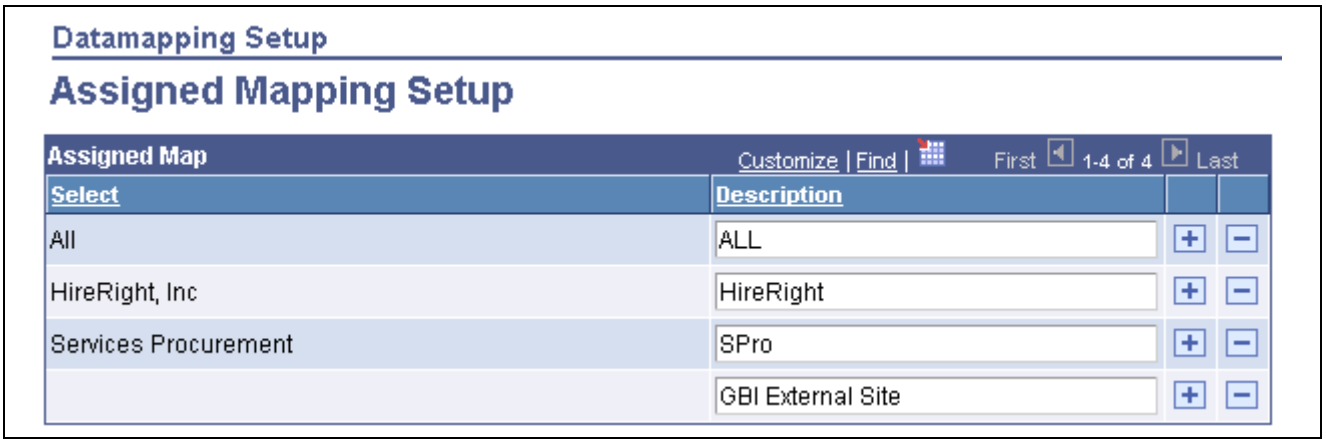
1. Create data mapping assignments.
2. Synchronize data for each data mapping category.
3. (Optional) Create the Verity indexes for each category.
4. Establish postal mappings for each country's postal address.
5. Establish the necessary open integration framework vendors.

Pages Used to Set Up Data Mapping

Page Name	Object Name	Navigation	Usage
Datamapping Setup - Assigned Mapping Setup	HRS_DM_MAP_SETUP	Set Up HRMS, Product Related, Recruiting, Integration, Data Mapping Assignments, Datamapping Setup - Assigned Mapping Setup	Create data mapping assignments.
Category Setup	HRS_DM_CAT_SETUP	Set Up HRMS, Product Related, Recruiting, Utilities, Data Mapping Categories, Category Setup	Set up categories.
Key List	HRS_DM_CAT_KEYLIST	Set Up HRMS, Product Related, Recruiting, Utilities, Data Mapping Categories, Key List	View key lists.
Value List	HRS_DM_CAT_VALLIST	Set Up HRMS, Product Related, Recruiting, Utilities, Data Mapping Categories, Value List	View value lists.
Unmapped Data	HRS_DM_UNMAPPED	Set Up HRMS, Product Related, Recruiting, Integration, Data Mapping, Unmapped Data	Map unmapped data.
Key Data Mapping	HRS_DM_MAPING_DICT	Set Up HRMS, Product Related, Recruiting, Integration, Data Mapping, Key Data Mapping	Map keys.
Value Data Mapping	HRS_DM_VALUE	Set Up HRMS, Product Related, Recruiting, Integration, Data Mapping, Value Data Mapping	Map values.
Inbound Map	HRS_HRXML_PSTL_IN	Set Up HRMS, Product Related, Recruiting, Integration, Postal Map, Inbound Map	Map inbound postal information.
Outbound Map	HRS_HRXML_PSTL_OUT	Set Up HRMS, Product Related, Recruiting, Integration, Postal Map, Outbound Map	Map outbound postal information.

Creating Data Mapping Assignments

Access the Datamapping Setup - Assigned Mapping Setup page.



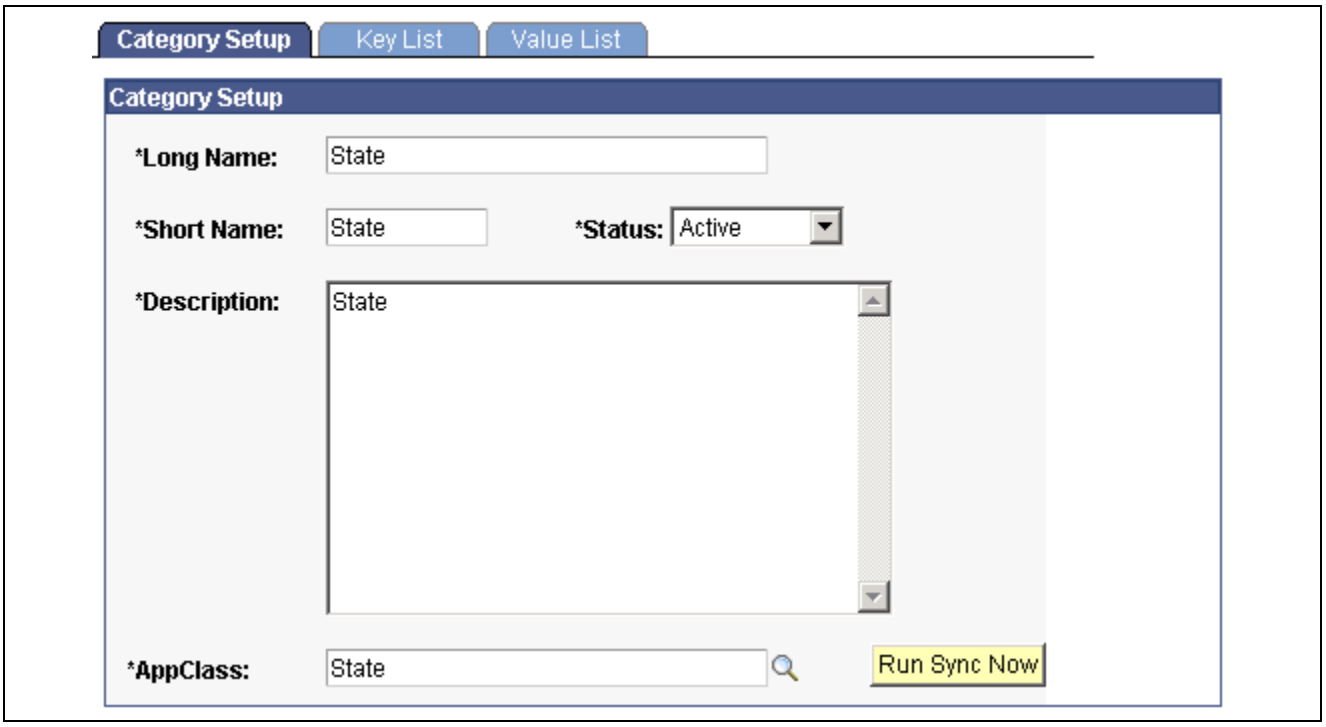
Datamapping Setup - Assigned Mapping Setup page

Assigned Map

Use this group box to specify the vendors, sites, or recruitment sources that will not use the default data map. The description is used on the Unmapped Data, Key Data Mapping, and Value Data Mapping pages.

Setting Up Categories

Access the Category Setup page.



Category Setup page

AppClass (application class) Select an application class category. These categories are defined on the Application Class Registry page.

Run Sync Now (run synchronization now) Click to synchronize the data that is associated with the selected data mapping category with the data actually existing in the corresponding component. This process populates the Key List and Value List pages.

Viewing Key Lists

Access the Key List page.



Key List page

Subcategory Serves as a secondary key for the data mapping functionality. Not all categories use the subcategory secondary key. Subcategories themselves must also be data mappings.

Keys Displays the primary key for the category. These keys are determined by the data in the associated data mapping category tables. Click the key link to access the Key Data Mapping page. This page displays all the values that are mapped to the given key.

Viewing Value Lists

Access the Value List page.

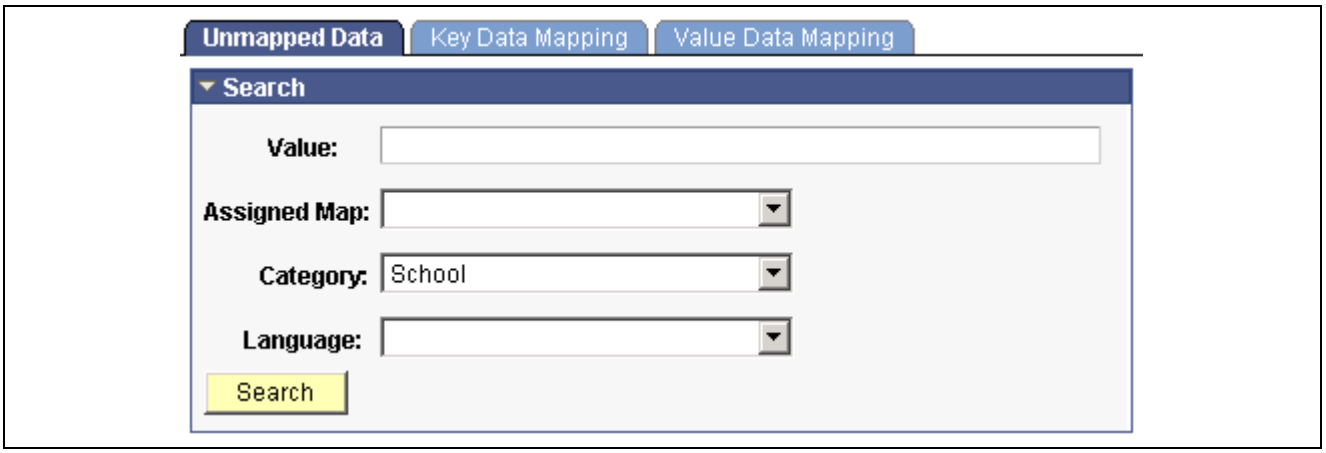


Value List page

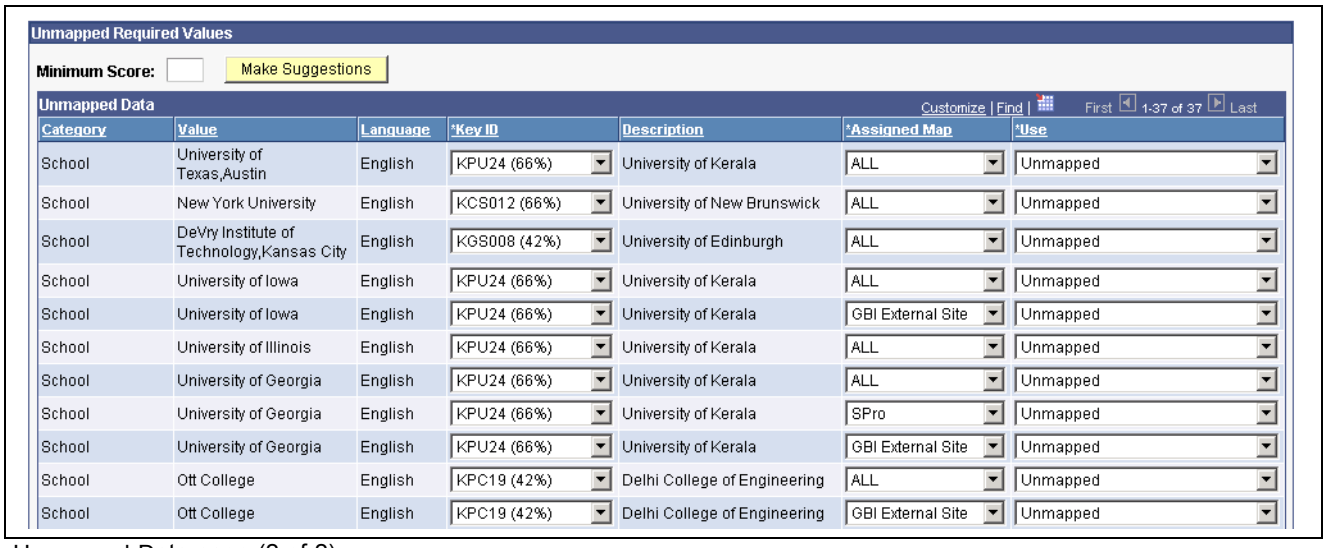
The Value List page lists all the values that are being mapped to a category key. Click a link in the Keys column to access the Value Data Mapping page.

Mapping Unmapped Data

Access the Unmapped Data page.



Unmapped Data page (1 of 2)



Category	Value	Language	*Key ID	Description	*Assigned Map	*Use
School	University of Texas,Austin	English	KPU24 (66%)	University of Kerala	ALL	Unmapped
School	New York University	English	KCS012 (66%)	University of New Brunswick	ALL	Unmapped
School	DeVry Institute of Technology,Kansas City	English	KGS008 (42%)	University of Edinburgh	ALL	Unmapped
School	University of Iowa	English	KPU24 (66%)	University of Kerala	ALL	Unmapped
School	University of Iowa	English	KPU24 (66%)	University of Kerala	GBI External Site	Unmapped
School	University of Illinois	English	KPU24 (66%)	University of Kerala	ALL	Unmapped
School	University of Georgia	English	KPU24 (66%)	University of Kerala	ALL	Unmapped
School	University of Georgia	English	KPU24 (66%)	University of Kerala	SPro	Unmapped
School	University of Georgia	English	KPU24 (66%)	University of Kerala	GBI External Site	Unmapped
School	Ott College	English	KPC19 (42%)	Delhi College of Engineering	ALL	Unmapped
School	Ott College	English	KPC19 (42%)	Delhi College of Engineering	GBI External Site	Unmapped

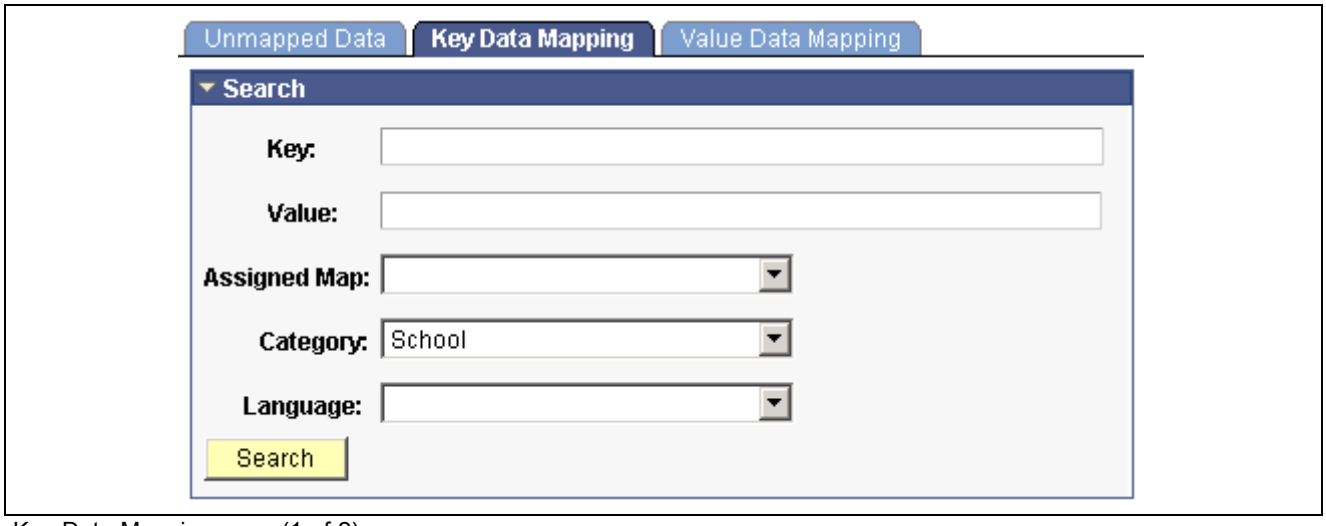
Unmapped Data page (2 of 2)

Minimum Score Identifies a threshold for the Make Suggestions search. Only results that are greater than or equal to the minimum score appear in the Key ID field. The score of every suggestion found appears to the right of each key ID item in parentheses.

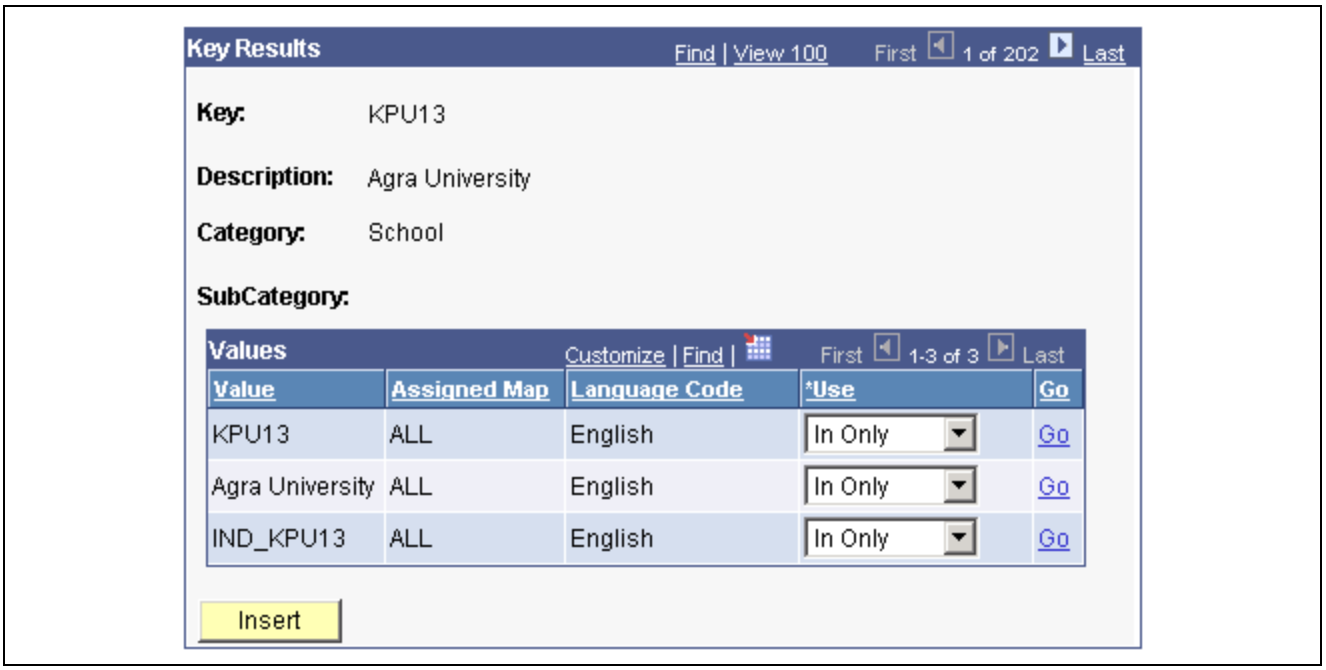
Make Suggestions Click to run a search that provides a suggested mapping based on the minimum score that you entered.

Mapping Keys

Access the Key Data Mapping page.



Key Data Mapping page (1 of 2)



Key Data Mapping page (2 of 2)

This page displays a complete list of all the values that are mapped to a given key.

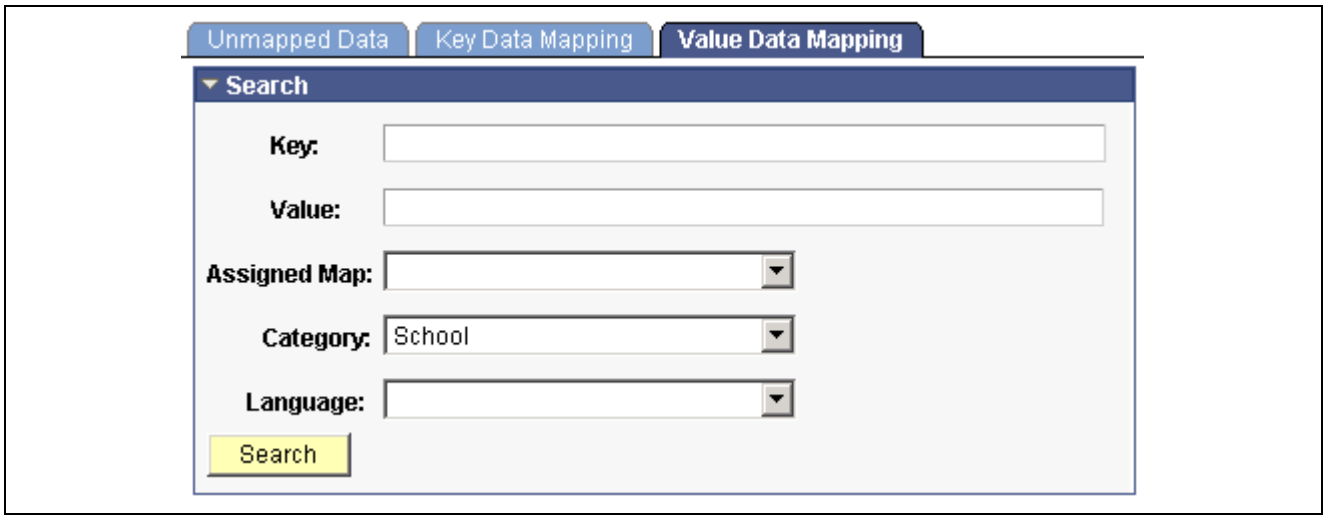
Values

This group box enables you to add other values to the key. The values must be chosen from the unmapped data values.

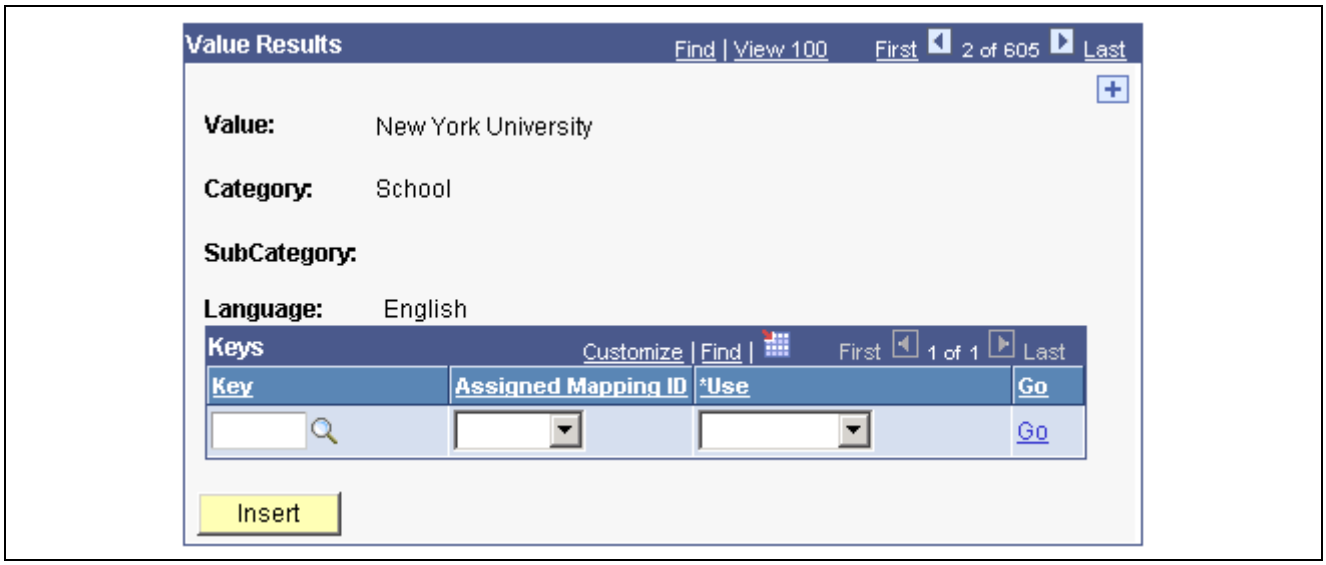
Value	Select the values that are associated with the key.
Assigned Map	Select the data mapping assignment that the key is associated with.
Language Code	Select the language that the value is assigned to
Use	Select to use this data mapping for incoming data, outgoing data, or both.
Insert	Click to add a row to the group box.

Mapping Values

Access the Value Data Mapping page.



Value Data Mapping page (1 of 2)



Value Data Mapping page (2 of 2)

Displays all the keys that are mapped to the given value.

Keys

This group box displays all the keys that are mapped to the value and enables you to map more keys to the value. The keys that you add come from the unmapped data values.

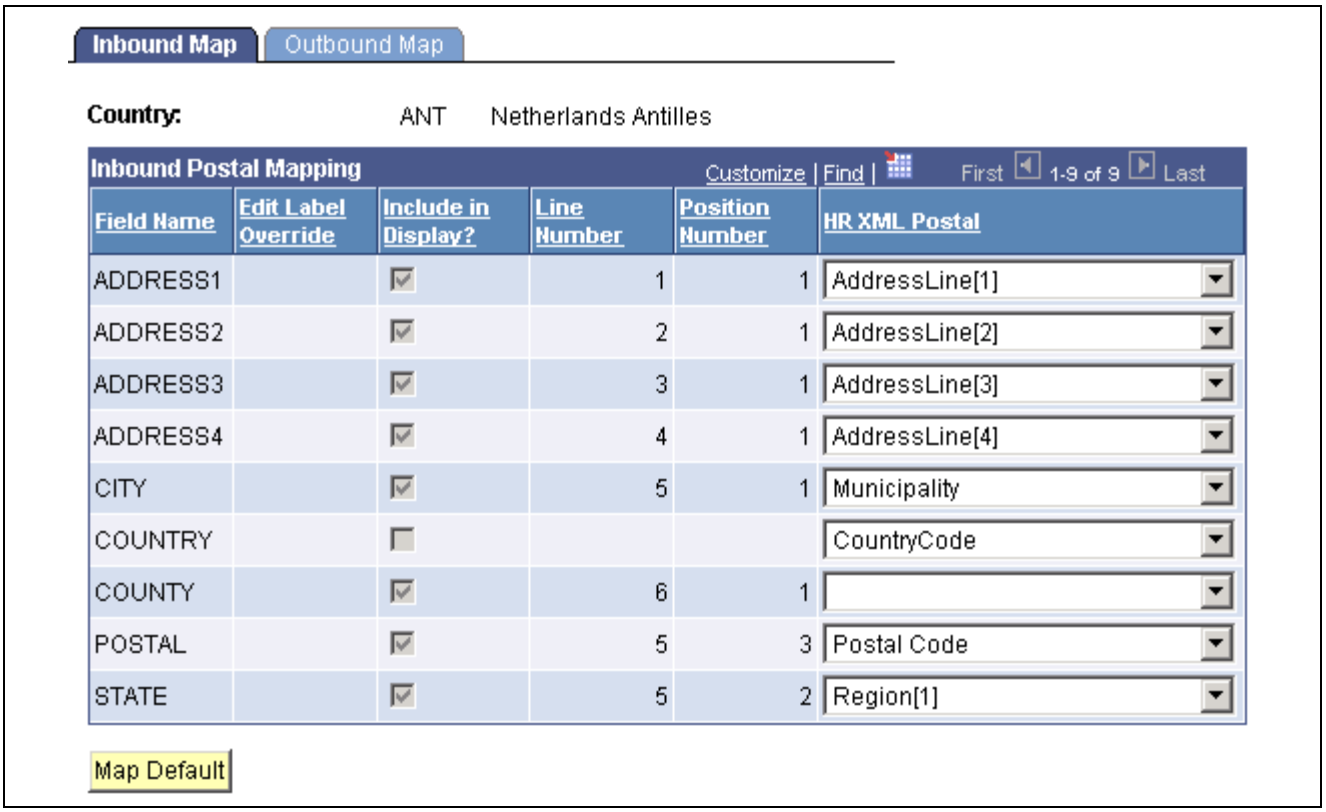
Key Select the key ID of the data mapping.

Assigned Mapping ID Select the data mapping assignment that the key is associated with.

Use Select to use this data mapping for incoming data, outgoing data, or both.

Mapping Inbound Postal Information

Access the Inbound Map page.



Inbound Map page

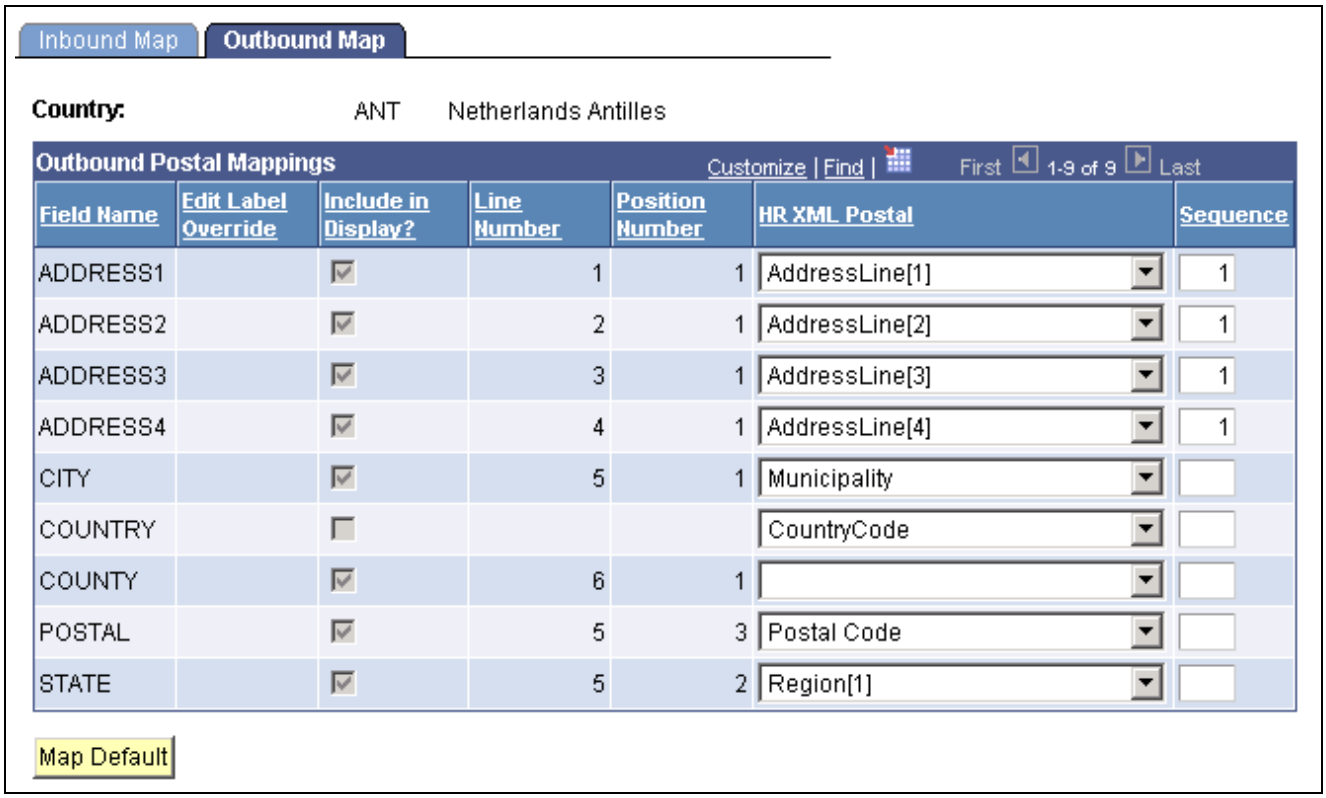
This page displays the field names that are associated with the Country table.

HR XML Postal Select the XML element where you want the corresponding PeopleSoft field to be written for incoming messages.

Map Default Click to have the system make an initial guess at what the mapping from the XML should be.

Mapping Outbound Postal Information

Access the Outbound Map page.



Outbound Map page

This page displays the address field names that are associated with the Country table.

HR XML Postal Select the XML element where you want the corresponding PeopleSoft field to be written for outgoing messages.

Map Default Click to have the system make an initial guess at what the mapping from the XML should be.

Sequence When multiple data elements from the PeopleSoft address table are mapped to a single element in the XML document, the sequence number determines the order in which the PeopleSoft fields are mapped.

Setting Up Autoscreening

To set up autoscreening, use the AutoScreen Setup (HRS_AUTOSCREEN) component.

This section provides an overview of autoscreening criteria, lists prerequisites, and discusses how to define criteria to automatically screen incoming resumes.

Understanding Autoscreening Criteria

PeopleSoft delivers two autoscreening criteria:

- Email Verification.
- Default Status - Always Fail.

You can create more as needed.

Prerequisites

Before you set up autoscreening, you must set up application classes.

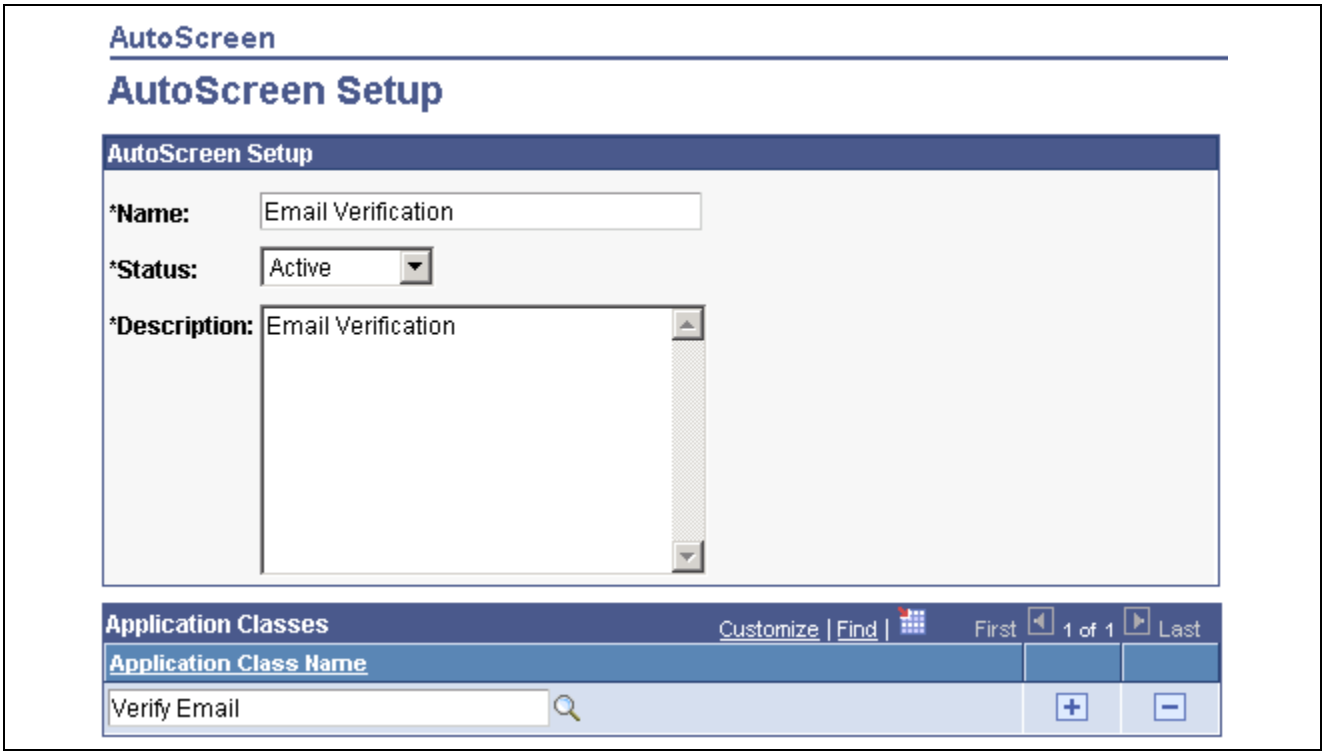
See Chapter 5, "Setting Up Third Party Integrations," Setting Up Application Classes, page 78.

Page Used to Set Up Autoscreening

Page Name	Object Name	Navigation	Usage
AutoScreen - AutoScreen Setup	HRS_AUTOSCREEN	Set Up HRMS, Product Related, Recruiting, Recruitment Sources, AutoScreen, AutoScreen - AutoScreen Setup	Define criteria to automatically screen incoming resumes.

Defining Criteria to Automatically Screen Incoming Resumes

Access the AutoScreen - AutoScreen Setup page.



AutoScreen - AutoScreen Setup page

Setting Up Recruitment Sources

To set up recruitment sources, use the Source Setup (HRS_SOURCE_SETUP) component.

This section provides an overview of recruitment sources, lists prerequisites, and discusses how to:

- Define recruiting contacts.
- Select a recruitment source type.
- Define sites for a company recruitment source.
- Define sites and subsources for a marketing recruitment source.
- Define business rules for incoming resumes.
- Define contacts for a recruitment source.

Understanding Recruitment Sources

The system uses recruitment sources to identify where resumes come from and where job openings are posted to. Examples of recruitment sources that you can define include:

- Job board providers.
- Recruiting agencies.
- Services procurement providers.
- Newspapers.
- Magazines.
- Advertisements.
- Internet.

When you create a recruitment source, you must select a source type. The source type that you select determines which pages appear in the Source Setup component. The Source Setup component consists of three pages. The Source Setup and Contacts pages appear for all source types. The third page that appears depends on the source type that you select. PeopleSoft delivers four source types:

Source Type	Description
Company	Company recruitment sources establish a company site source. This type of source is primarily used to post to company sites. For company recruitment sources, the Company page appears.
Employee	Employee recruitment sources establish an employee as the source. When employee is selected as the source, the vendor type is this type of source. For employee recruitment sources, the Marketing page appears.

Source Type	Description
Marketing	Marketing recruitment sources do not have an integration that is supported by open integration framework or email. Vendor type recruitment sources do allow you to establish a subsource but, only dynamically through the open integration framework. For marketing recruitment sources, the Marketing page appears.
Vendor	Vendor recruitment sources establish an integration that is supported by the open integration framework and emails. Vendor type recruitment sources do allow a subsource to be established but, only dynamically through the open integration framework. For vendor recruitment sources, the Vendor page appears.

You can define subsources for a source with a source type of Marketing. For example, you can create a Marketing source called Newspaper and then create a subsource for each newspaper to which the organization posts job openings.

Prerequisites to Setting Up Recruitment Sources

Before you set up recruitment sources, you must:

- Set up vendors.

  See Chapter 5, “Setting Up Third Party Integrations,” Setting Up Recruiting Vendors, page 82.

- Set up sites.

  See *PeopleSoft Enterprise Candidate Gateway 8.9 PeopleBook*, “Setting Up Candidate Gateway,” Setting Up Sites.

- Set up recruitment contacts.

  See Chapter 2, “Setting Up the Recruiting Process,” Defining Recruiter Roles, page 12.

- Set up autoscreening criteria for Vendor source types.

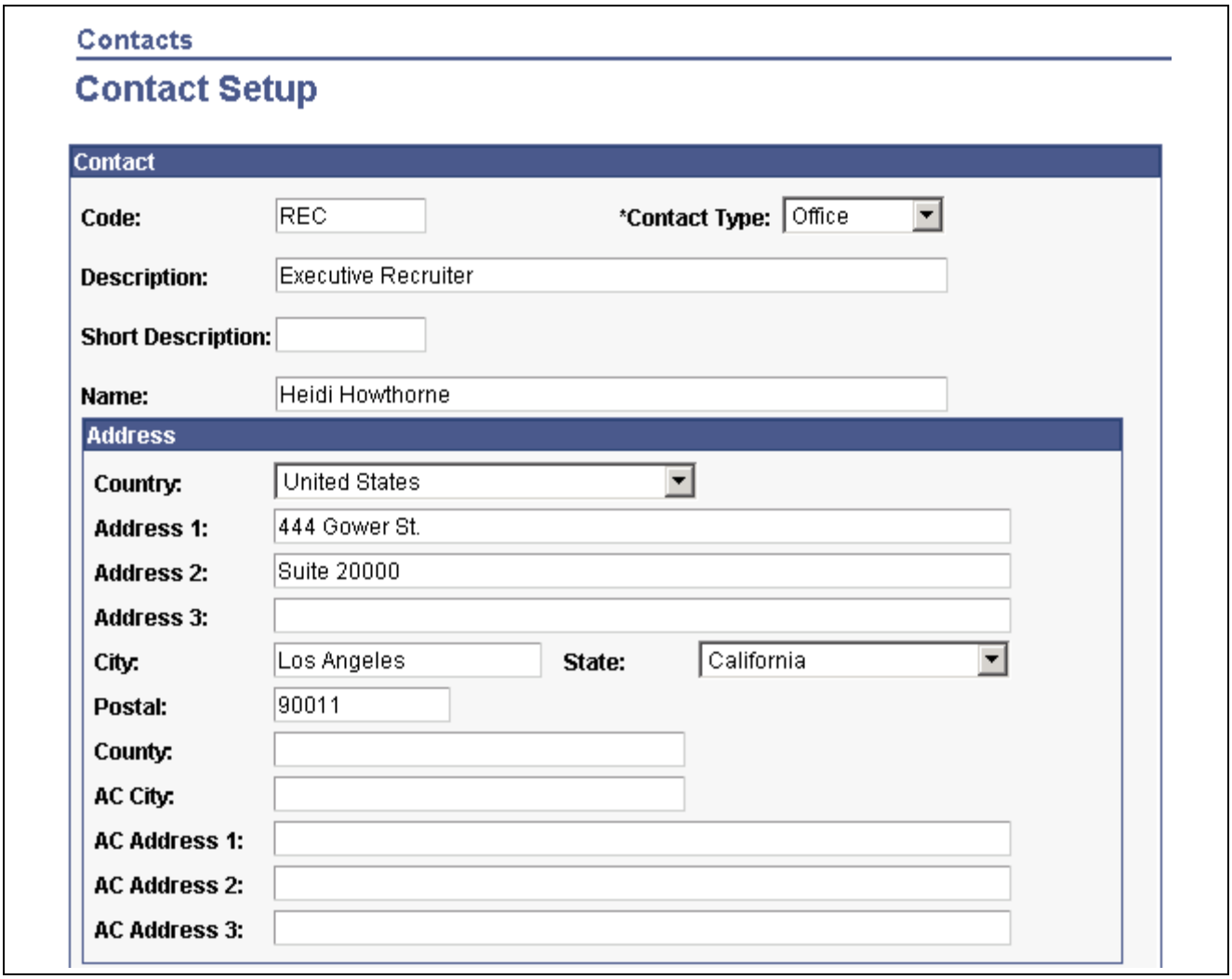
  See Chapter 5, “Setting Up Third Party Integrations,” Setting Up Autoscreening, page 96.

Pages Used to Set Up Recruitment Sources

Page Name	Object Name	Navigation	Usage
Contacts - Contact Setup	HRS_CONTACT	Set Up HRMS, Recruiting, Recruitment Sources, Recruitment Contacts, Contacts - Contact Setup	Define recruiting contacts.
Source Setup	HRS_SOURCE_BASIC	Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Recruitment Sources, Source Setup	Select a recruitment source type and define basic information for a source.
Company	HRS_SOURCE_CMPNY	Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Recruitment Sources, Company	Define sites for a company recruitment source.
Marketing	HRS_SOURCE_MKT	Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Recruitment Sources, Marketing	Define sites and subsources for a marketing recruitment source.
Vendor	HRS_SOURCE_VNDR	Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Recruitment Sources, Vendor	Defining business rules for incoming resumes.
Contacts	HRS_SOURCE_CONTACT	Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Recruitment Sources, Contacts	Define contacts for a recruitment source.

Defining Recruiting Contacts

Access the Contacts - Contact Setup page.



Contacts - Contact Setup page (1 of 2)



Contacts - Contact Setup page (2 of 2)

Contact

Contact Type Select the type of contact. Values are:

General: This option is reserved for future use.

Office: Used in the Recruiting Office field when you are creating a job opening to identify the recruitment contact.

Source: Defines the details for proxy information.

-
-

Address

Enter the address for this contact.

Telephone

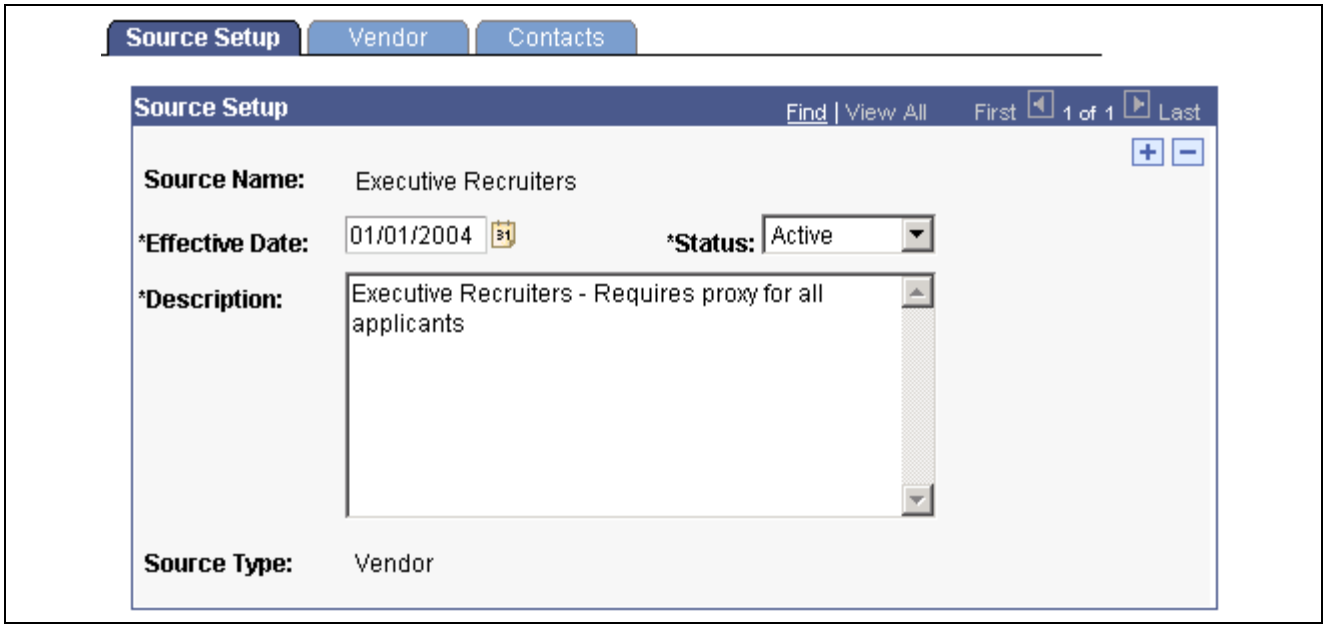
Enter the telephone numbers for this contact.

Email Addresses

Enter the email addresses for this contact.

Selecting a Recruitment Source Type

Access the Source Setup page.



Source Setup page

Source Name Enter a source name. You cannot edit this field after you save the source.

Effective Date Enter an effective date. The only page in the system where you can select a source prior to the effective date is the Job Opening - Posting Information page. On this page, you can select a future-dated source as long as the effective date of that source is within the posting dates for that posting.

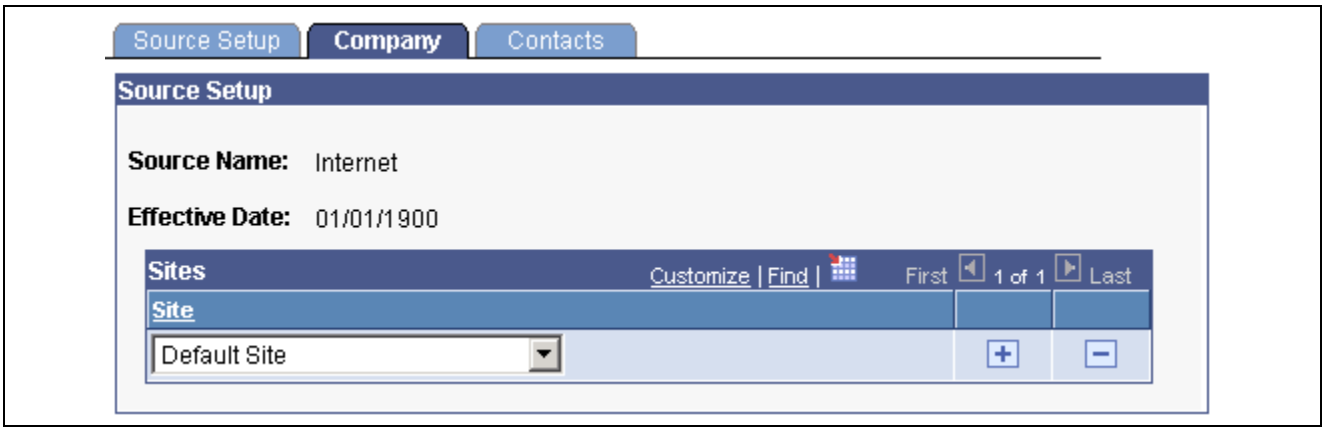
Status Select *Active* or *Inactive.* Inactive sources do not appear in system prompts.

Description Enter a description. This field is used only for informational purposes.

Source Type Select a source type: *Company, Employee, Marketing,* or *Vendor.* The source type that you select here controls the pages that appear in this component. When you select a source type, the Company, Marketing, or Vendor page appears, depending on the source type that you select.

Defining Sites for a Company Recruitment Source

Access the Company page.



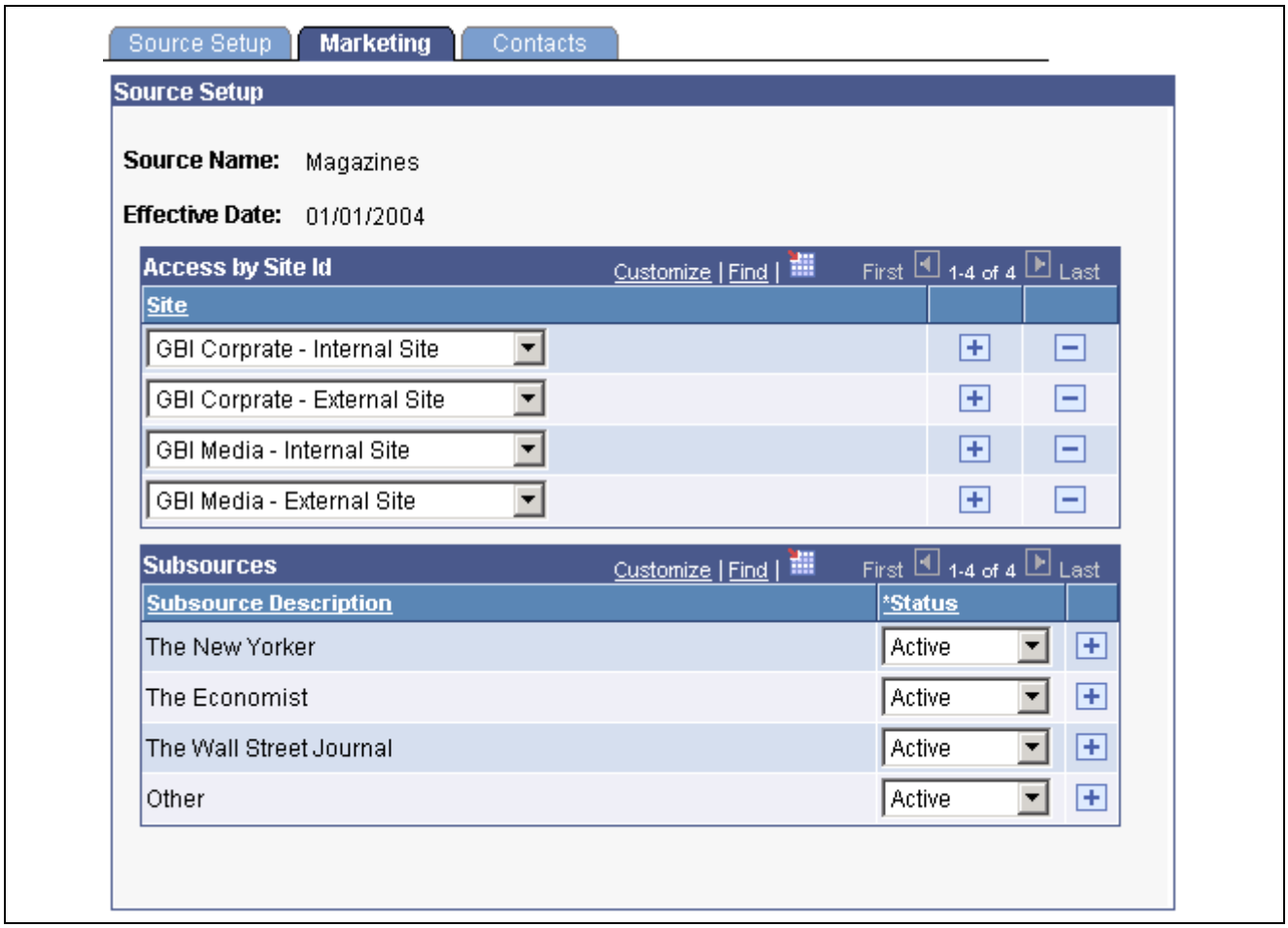
Company page

The Company page appears only if you select *Company* in the Source Type field on the Source Setup page.

Site Select one or more sites. When a recruiter or hiring manager creates a job opening and selects to post the job opening to this source, the system posts the job opening to all of the sites that you select here. The sites that you select here override the default security that you set up. For example, when a recruiter creates a job opening for a position in business unit A, the default security might restrict the job opening to sites that are used only to post job openings for business unit A. On this page, you can select sites that are used to post job openings for business units A, B, and C. When the recruiter selects this company source to post to, the job opening is posted to all sites regardless of the default security. Define sites on the Site - Site Setup page.

Defining Sites and Subsources for a Marketing Recruitment Source

Access the Marketing page.



Marketing page

The Marketing page appears only if you select *Marketing* in the Source Type field on the Source Setup page.

Access by Site Id

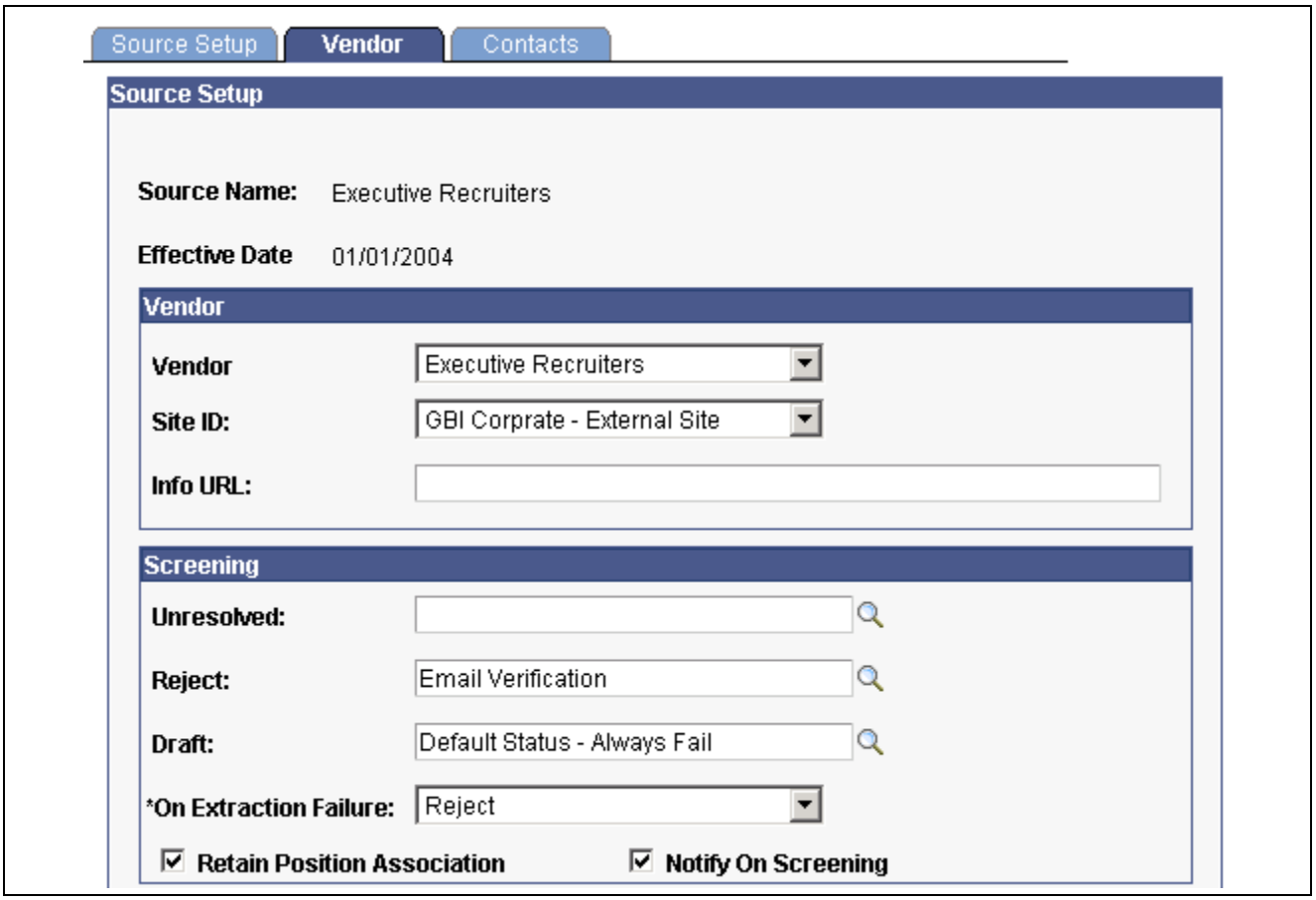
Use this grid to specify which online application sites this source appears on. When applicants complete online job applications using PeopleSoft Enterprise Candidate Gateway, they can select a value in the How did you find out about us? field in the Referral Summary group box if the resume template includes the Referrals section. This source appears as an option in the How did you find out about us? field for all sites that you specify here.

Subsources

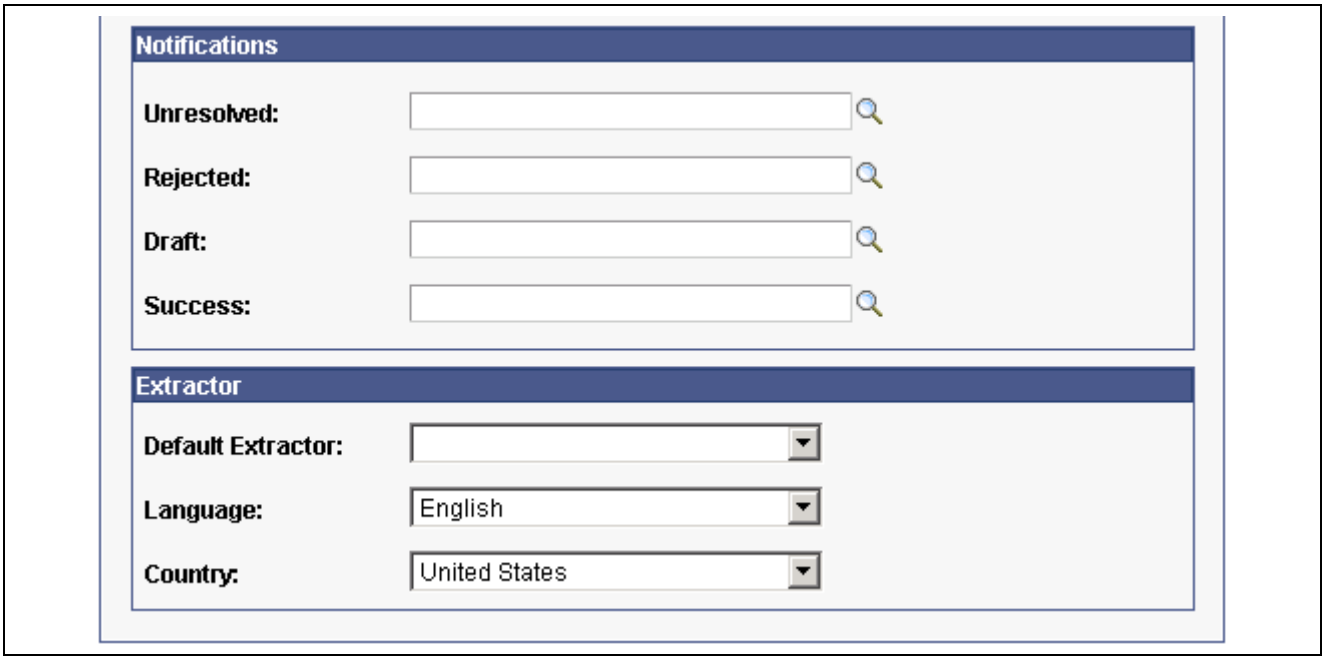
Use this grid to define subsources for the source. When you select a source on the Load Resume - Prepare Load Parameters page or online application pages in Candidate Gateway, you also can select a subsource if you define subsources here. Only active subsources appear as valid options. You cannot edit or delete the subsource description that you enter after you save the source.

Defining Business Rules for Incoming Resumes

Access the Vendor page.



Vendor page (1 of 2)



Vendor page (2 of 2)

The Vendor page appears only if you select *Vendor* in the Source Type field on the Source Setup page.

Vendor

Vendor Select a vendor to which organizations will post job openings or from which they will receive applicants. The only vendors that you can select from are vendors from the JobBoard transaction group.

Site ID Select the site to which applicants will be redirected when they receive an email notification that requires them to go to an online application site to enter or review information.

Info URL (information uniform resource locator) Enter the URL that determines where users can go to view the job postings for this source.

Screening

Unresolved, Reject, and **Draft** Select the autoscreen definition that you want to associate with each status. During the autoscreen process, the system processes the statuses in this order:

1. Reject
2. Unresolved
3. Draft

The system starts with the first status (Reject) and checks the associated autoscreen definition. If the applicant does not pass the autoscreening criteria, the process stops and the system assigns the Reject status to the resume. If the applicant passes the autoscreening criteria, or if no autoscreening definition is associated with the status, the process moves on to the next status (Unresolved). If the applicant passes all three statuses, the system assigns the status Success to the resume.

Before any autoscreening can begin, the extraction process must be successfully complete. Define autoscreening criteria on the AutoScreen - AutoScreen Setup page.

On Extraction Failure Select the status that you want to assign to a resume if resume extraction fails for the resume.

Retain Position Association Select to have the system retain the job opening with which the resume is associated. This option is valid only for applicants that the system receives through open integration framework. For all other cases, no association with a job opening exists.

Notify On Screening Select to notify applicants after the screening process is complete. If you select this option, the system uses the values that you specify in the Notifications group box to determine which notification to send.

Notifications

Use this group box to select the notification that the system sends to each applicant whose resume meets the respective status. For the system to send these notifications, you must select the Notify on Screening option in the Screening group box.

PeopleSoft delivers four templates, one for each status. When you create a new source, the system populates each of the fields with the associated notification. If you do not select a notification for a status, the system doesn't send a notification for that status.

These are the default values:

Field	Notification
Unresolved	HRS_HROI_UNRESOLVED
Rejected	HRS_HROI_REJECTED
Draft	HRS_HROI_DRAFT
Success	HRS_HROI_SUCCESS

Extractor

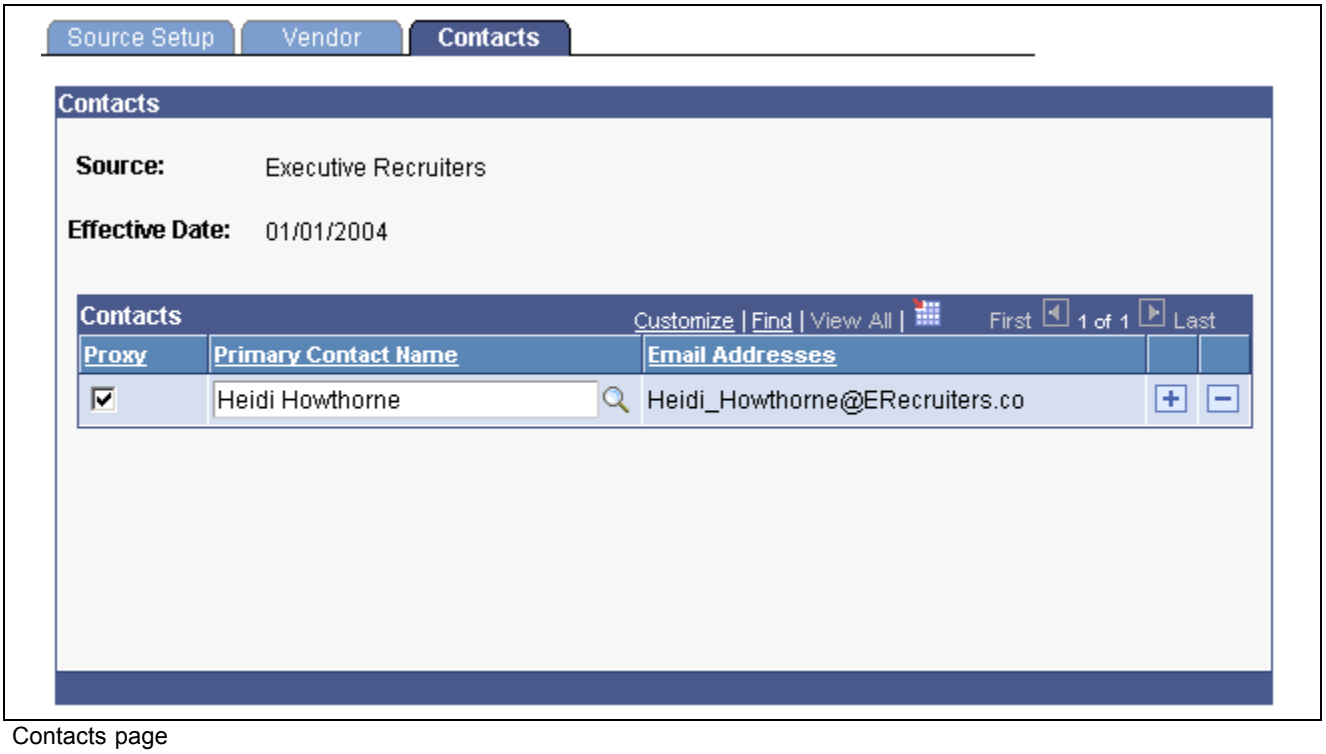
Default Extractor Select the default resume extractor that the system uses for non-XML resumes that come from this source. However, note that you can process resumes through another extractor by using the Manage Resumes (HRS_AL_LOG) component.

Language Select a language in which the resumes are written. Some resume extractors require a language to begin the extraction process.

Country Select a country. Some resume extractors require a country to begin the extraction process.

Defining Contacts for a Recruitment Source

Access the Contacts page.



Contacts page

Proxy	Select to have the system create a proxy for incoming applicants from this source. This proxy functionality applies only to Vendor source types. When a staffing supplier submits a resume, it is common not to contact the applicant to whom the resume belongs. Instead, all communication with the applicant, up until the interview with the applicant, is done through the staffing supplier. The person at the staffing supplier organization who handles this duty is referred to as a proxy. The proxy takes on all responsibilities of the applicant and is both responsible and expected to act in the best interest of the applicant. On system pages that show applicant contact information, the contact information for the proxy is also included. When you send correspondence to an applicant who uses a proxy, the system sends the correspondence to the proxy, not the applicant.
Primary Contact Name and **Email Addresses**	Select a contact. You can select from any contact that has a contact type of general. When you select a contact, the system populates the Email Addresses field with the email address of the contact. Define contacts on the Contacts - Contacts Setup page.

Setting Up Resume Email Accounts

To set up resume email accounts, use the (HRS_EMAIL_SETUP) component.

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

- Set up resume email accounts.
- View lists of emails.
- View email attachments and select resumes.

Understanding Resume Email Accounts

If the organization requires applicants or staffing suppliers to submit resumes using email, you must set up one or more email accounts to receive those emails. In most cases, the applicants that send resumes to an email account are external applicants.

The system can process resumes that applicants send using email as attachments and resumes that are included in the body of the email message. If no attachment is found on the email, the system assumes that the resume is in the body of the email message. The system enables recruitment administrators to select which part of the email is the resume that will be passed to the resume extractor on the View Email Message/Attachments page.

The system does not support multiple resumes per email. If the system receives an email with multiple attachments, it processes the email as a single applicant even if it contains resumes from multiple applicants. This enables an applicant to send individual cover letter, resume, and reference attachments.

Setting Up Resume Email Accounts

To receive incoming resumes by email:

1. Set up an email account, user name, password, and email server to receive resumes.
2. Set up a resume extractor vendor.

   See Chapter 5, “Setting Up Third Party Integrations,” Setting Up Recruiting Vendors, page 82.

3. Set up a recruitment source of type Vendor to associate with the incoming emails.

   See Chapter 5, "Setting Up Third Party Integrations," Setting Up Recruitment Sources, page 97.

4. Set up an email node on the Connectors page.

   PeopleSoft delivers the following standard email node: MCF_GETMAIL.

   a. You must select a valid value in the Value column for the MCF_AttRoot property.

      This value specifies where email attachments are temporarily stored. The MCF_AttRoot value is supplied to the Path field on the Resume Email page by default when you create a new email account.

   b. Select *True* in the Value column for the MCF_Force_Download_Attachments property.

5. Create an email account on the Resume Email page.

   Associate the email address, user name, password, email server, resume extractor vendor, recruitment source, and email node with the email account.

6. (Optional) Set up data mappings to support applicants from the recruitment source.

Processing Emails

To process emails that you receive in the email account:

1. Run the Email Checking Process Application Engine process (HRS_HROI_EML).

   When you run this process, the system checks the email account for emails, deletes the emails from the email account in box, and writes the emails to the database. Because the system deletes all emails from the email account in box, you should not use a personal email address when you create the email account. The emails that the system writes to the database appear on the Email List page. The system stores all content from the email in the database, including the HTML, text, subject line, email address, and attachments.

2. Run the Process Awaiting Email Application Engine process (HRS_PRCS_EML).

   This process extracts data from the resumes for all email messages that are written to the database. The system processes all resumes that appear on the Email List page.

   The recruitment source that you assign to the email account determines how the system handles incoming resumes. For example, the system uses the resume extractor, country, and language that you associate with the recruitment source to extract data from the resumes, and the system uses the screening setup parameters that you specify for the recruitment source to determine which status to assign to each resume and what notification to send to each applicant, if any, based on the assigned status.

Schedule the Email Checking Process and Process Awaiting Email processes to run by using the Process Scheduler Request page in PeopleTools. You can also manually run the Email Checking Process by clicking the Check Email button on the Email List page.

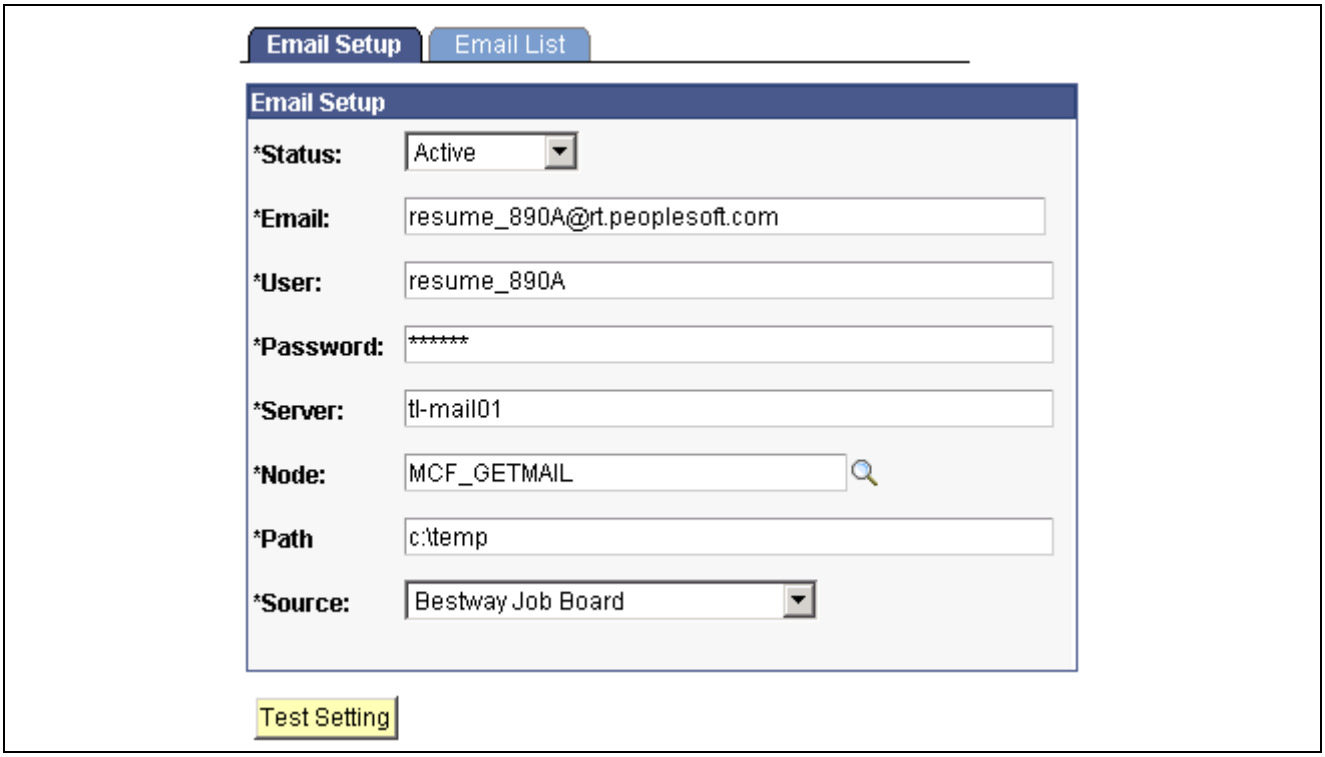
See *Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Process Scheduler, "Submitting and Scheduling Process Requests"*

Pages Used to Define Resume Email Accounts`

Page Name	Object Name	Navigation	Usage
Email Setup	HRS_EMAIL_SETUP	Set Up HRMS, Product Related, Recruiting, Integration, Resume Email, Email Setup	Set up resume email accounts where organizations or individuals will send resumes.
Email List	HRS_EMAIL_LIST	Set Up HRMS, Product Related, Recruiting, Integration, Resume Email, Email List	View a list of emails that have been retrieved from the email account.
View Email Message/Attachments	HRS_EMAIL_VIEW	Set Up HRMS, Product Related, Recruiting, Integration, Resume Email, Email List	View email attachments and select resumes.

Setting Up Resume Email Accounts

Access the Email Setup page.



Email Setup page

Status Select a status: *Active* or *Inactive.* If you select *Inactive,* the system does not run the Email Checking Process. However, the system does run the Process Awaiting Emails process for all resumes in the Awaiting Resolution state.

Email, User, and **Password** Enter the email address where you want to receive applicant emails, and the user ID and password for the email address.

Server Enter the email server where you set up the email address.

Node Select the node that you set up to receive emails. PeopleSoft delivers the following standard email node: MCF_GETMAIL.

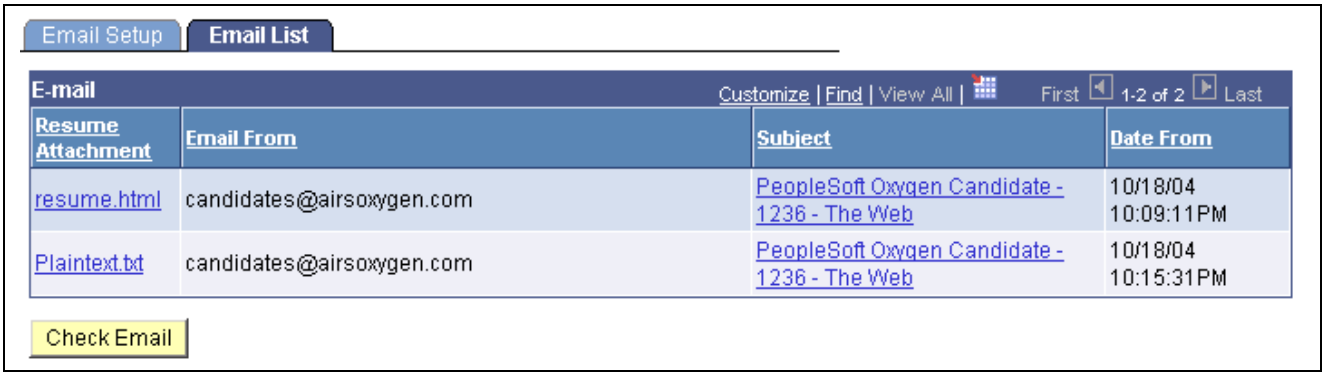
Path Enter the path where the email node stores email attachments. By default, the value that you specify for the MCF_AttRoot property on the Connectors page appears here.

Source Select the recruitment source with which you want to associate the incoming emails. Only recruitment sources with a source type of Vendor appear in the prompt. This is not a required field; however, you should populate this field with a source to properly manage incoming resumes. Define recruitment sources by using the Source Setup (HRS_SOURCE_SETUP) component.

Test Setting Click to test the setup. In this process, the system obtains an email count. If the system can get a count, even if the count is zero, the setup is a success. A success or fail message appears depending on whether the setup is a success or failure.

Viewing Lists of Emails

Access the Email List page.



Email List page

E-mail

Use this group box to view a list of emails that have been retrieved from this email address.

Resume Attachment Displays the filename of the attachment that the system has selected to use as the applicant's resume in the resume extraction process. The system always selects the last attachment to use as the applicant's resume. If no attachments are in the email message, the system uses the text in the email message for the applicant's resume. If you determine that the attachment that the system selects is not the applicant's resume, use the View Email Message/Attachments page to select the appropriate attachment. Click an attachment link to view the file.

Email From Displays the email address of the sender.

Subject Displays the text that appears as the subject for the email. Click to access the View Email Message/Attachments page, where you can view the email message text and email attachments, and select the attachment that you want the system to use as the applicant's resume in the resume extraction process.

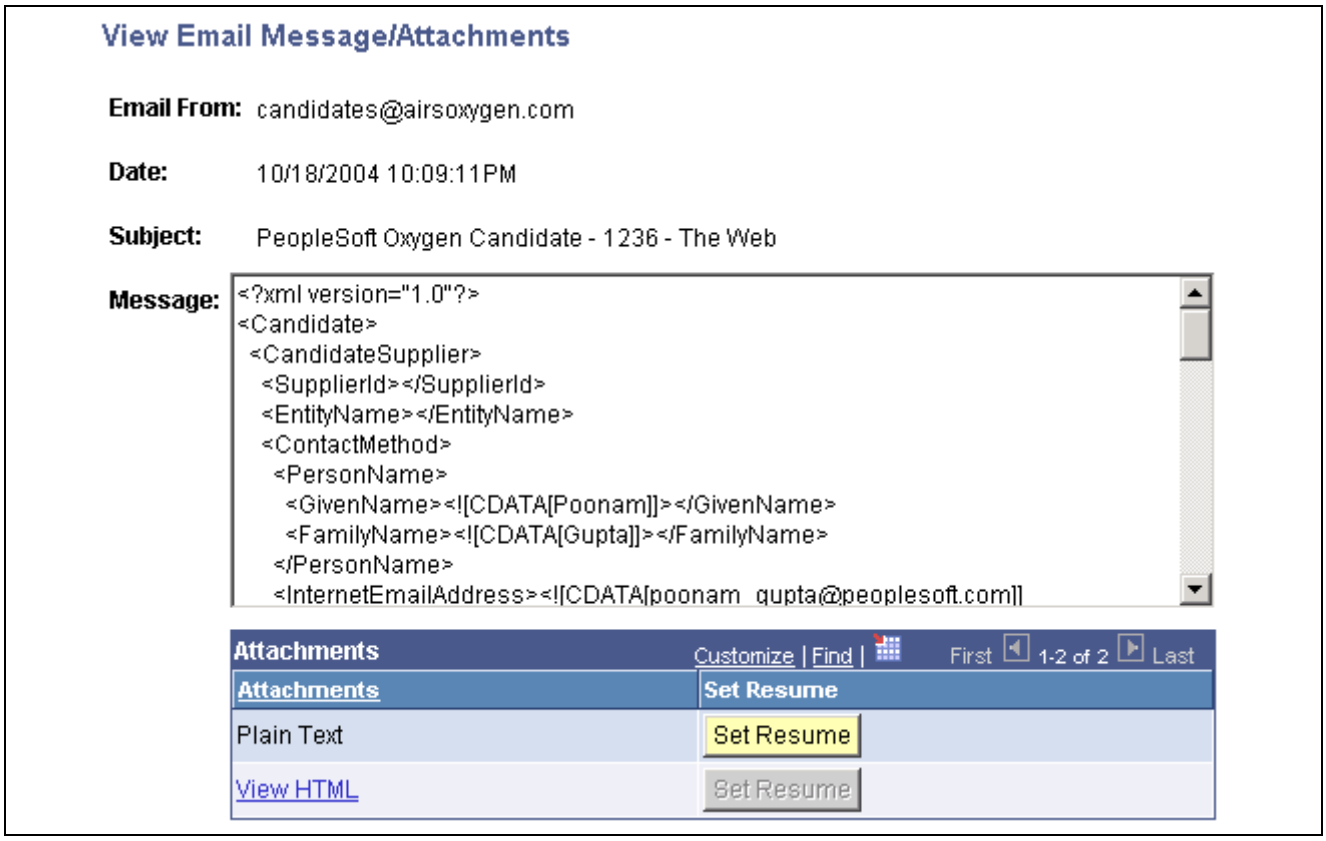
Date From Displays the date and time that the email was received in the email account.

Additional Page Element

Check Email Click to run the Email Checking Process.

Viewing Email Attachments and Selecting Resumes

Access the View Email Message/Attachments page.



View Email Message/Attachments

Use this page to view the email message text and email attachments, and select the attachment that you want the system to use as the applicant's resume in the resume extraction process.

Message Displays the exact message text from the email message.

Attachments

Attachments Displays all of the attachments that the system detects in the email message. Click an attachment link to view the file. The Plain Text attachments contain the actual message text from the email message.

Set Resume Click to set the associated attachment as the applicant's resume. This button is inactive for the attachment that the system selects as the resume.

Reviewing the Integration Transaction Log

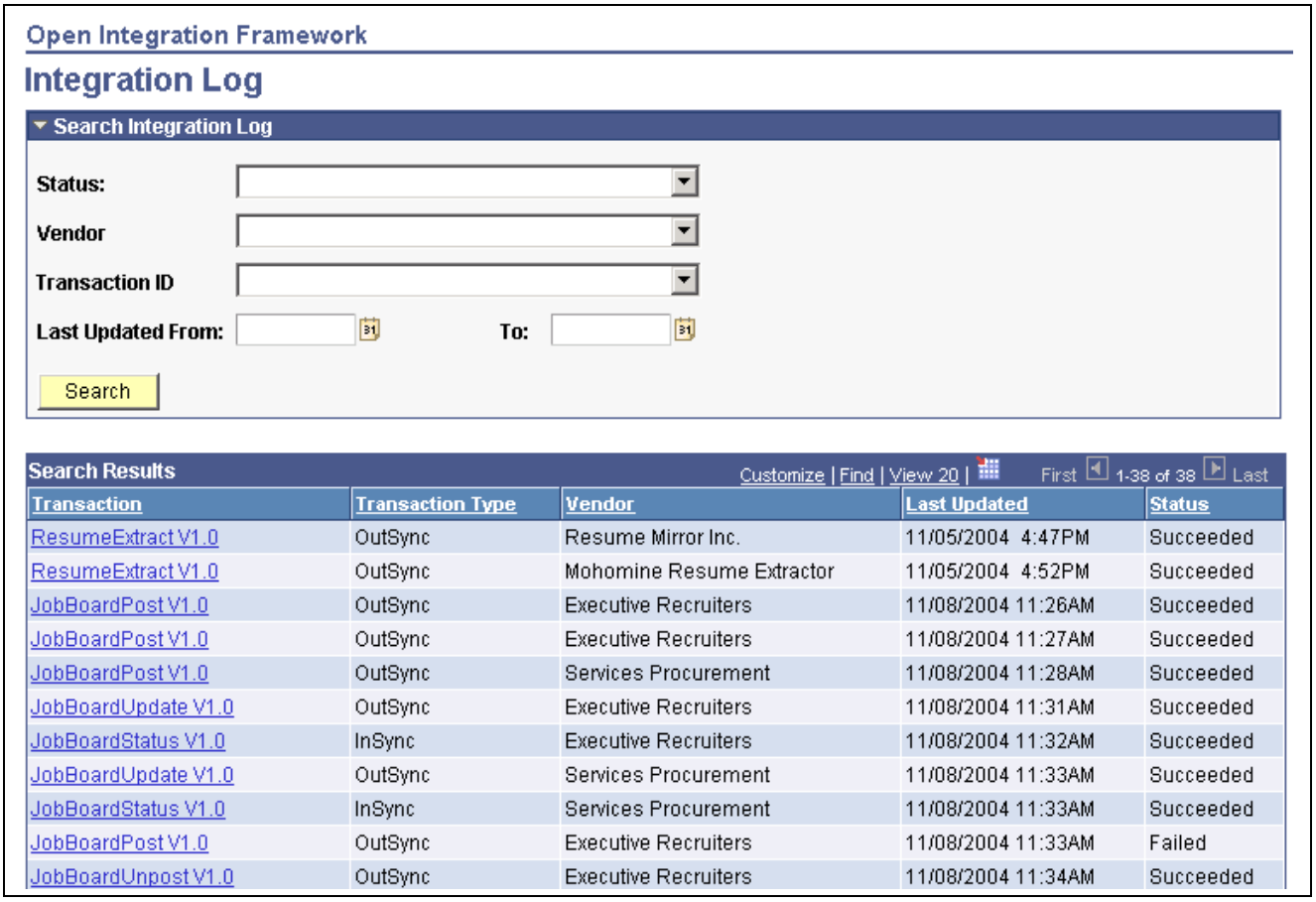
This section discusses how to review the integration transaction log.

Pages Used to Review the Integration Transaction Log

Page Name	Object Name	Navigation	Usage
Open Integration Framework - Integration Log	HRS_HROI_LOG	Set Up HRMS, Product Related, Recruiting, Integration, Integration Log, Open Integration Framework - Integration Log	Review the integration transaction log.
Integration Outgoing Messages	HRS_HROI_LOG_O_XML	Click a transaction link on the Open Integration Framework - Integration Log page.	Review outgoing messages.

Reviewing the Integration Transaction Log

Access the Open Integration Framework - Integration Log page.



Open Integration Framework - Integration Log page

Search Results

This group box displays the messages received from vendors that match the search criteria that you enter in the Search Integration Log group box.

CHAPTER 6

Working with Approvals

This chapter discusses how to define the approval process.

Defining the Approval Process

To define the approval process, use the Approval Process (SAC_AW_PRCS) and the Approval Transaction Registry (SAC_AW_TXN) components.

This section provides an overview of the approval process design and discusses how to:

- Define approval stages.
- Set up approval paths.
- Define approval steps.
- Define approval criteria.
- Register approval transactions.
- Define approval notifications.
- Process escalations and timeouts.

Understanding the Approval Process Design

Talent Acquisition Manager delivers two approval processes:

- JobOpening for creating job openings.

  See Chapter 8, “Creating Job Openings,” Understanding Job Opening Approvals, page 174.

- JobOffer for creating job offers.

  See Chapter 13, “Making Job Offers,” Understanding Job Offer Approvals, page 291.

The approval processes consist of stages, paths, steps, user lists, and criteria.

- Stages.

  Stages are the high level actions that the approval process performs in a specific order. Stages are made up of one or more paths. JobOpening and JobOffer use one stage.

- Paths.

  A path is a sequence of steps. JobOpening and JobOffer use one path.

- Steps.

A step represents one or more persons who are assigned to approve or review the transaction. Steps within a path are performed in sequence with separate criteria for each step that determines whether that step is performed. JobOpening uses two steps and JobOffer uses three steps.

- User Lists.

  User lists identify the people who are to act on a request. User lists can be roles, SQL definitions, queries, or application classes.

  JobOpening uses the following user lists: Hiring Manager Posn Supervisor and RecruiterGroup.

  JobOffer uses the following user lists: Hiring Manager Posn Supervisor, OfferRecruiterGroup, and RecruiterOnOffer.

- Criteria

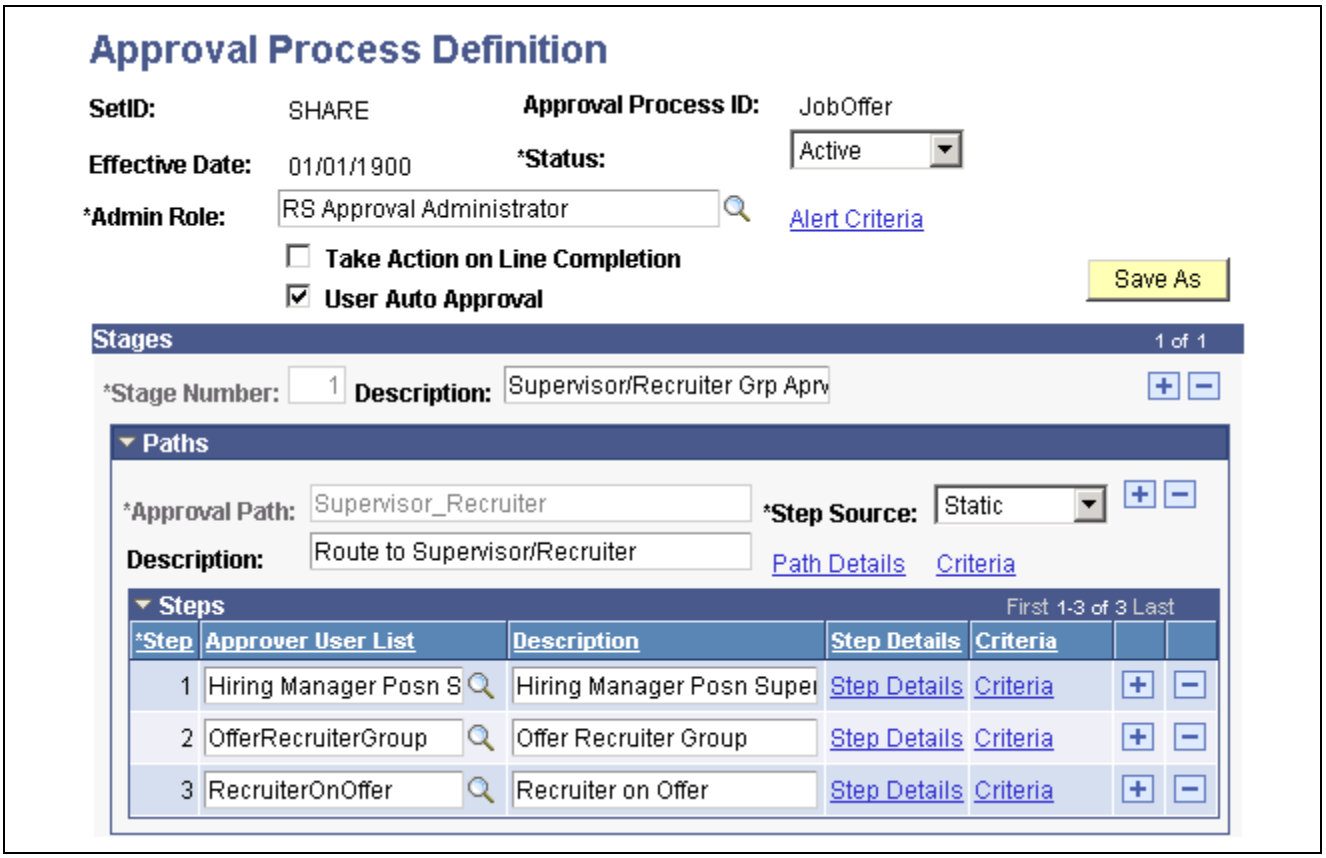
  Criteria defines the rules that are used by the approval process to determine whether a stage or step is performed.

Pages Used to Modify the Approval Process

Page Name	Object Name	Navigation	Usage
Approval Process Definition	SAC_AW_PRCS_MAIN	Set Up HRMS, Common Definitions, Approvals, Approval Process, Approval Process Definition	Define approval stages.
Approval Path Definition - Path	SAC_AW_PATH	Click the Path link on the Approval Process Definition page.	Set up approval paths.
Approval Step Definition - Step	SAC_AW_STEP	Click the Step Details link on the Approval Process Definition page.	Define approval steps.
Criteria Definition	SAC_CRITERIA	Click the Alert Criteria link on the Approval Process Definition page.	Define approval criteria.
Approval Transaction Registry	SAC_AW_TXN	Set Up HRMS, Common Definitions, Approvals, Approval Transaction Registry, Approval Transaction Registry	Register approval transactions.
Approval Transaction Registry - Notification	SAC_AW_TXN_NOTIFY	Set Up HRMS, Common Definitions, Approvals, Approval Transaction Registry, Notification	Define approval notifications.
Escalations and Timeouts	HRS_ESCL_RUN_INDEX	Set Up HRMS, Common Definitions, Approvals, Escalations and Timeouts, Escalations and Timeouts	Process escalations and timeouts.

Defining Approval Stages

Access the Approval Process Definition page.



Approval Process Definition page

Admin Role (administrator role) Select the user list role that the approval process uses to route the transaction to all users filling that role. This is usually based on job function, not individual users. User lists are defined on the User List page.

Alert Criteria Click to access the Criteria Definition page, where you can define user and field criteria along with monetary and application class criteria for this stage.

Take Action on Line Completion Line level approvals are not used in Peoplesoft Enterprise Human Capital Management (PeopleSoft Enterprise HCM). This check box should be left cleared.

User Auto Approval Select to enable the system to remember an approver's action for this process. The next time this approval process is presented to the approver, the system automatically applies the approver's selections. The automatic application of steps in the process is left unchanged until you clear the User Auto Approval check box.

Stages

Stage Number Enter the sequence in which you want this stage of the approval acted upon. You can also enter a description for the stage in the Description field.

Paths

Approval Path Enter a value that identifies this path. A path is a sequence of steps. An example would be a department path where a requisition requires approval up

a department hierarchy. Within a stage, paths are followed in parallel, with each path inheriting its level from the stage to which it belongs. Path-entry criteria determines whether a path is followed for a transaction thread. When a stage becomes active, approvers in the stage get pending work; all its contained paths become active simultaneously. All the paths of a stage queue work to approvers in parallel. The stage is complete only when all paths in it are complete. Each path has entry criteria associated with it. The purpose of this criteria is to determine whether that path should be triggered for a particular transaction. If the system determines the criteria that you enter for a path to be false for a transaction, then it bypasses the path for that transaction.

Step Source Select the method by which steps are instantiated during the approval process. Values are:

Static: Select to indicate that you want the system to use the individual user-defined steps when it processes an approval.

Dynamic: Select to indicate that you want the system to use either a query or an application class when it processes an approval.

Path Details Click to access the Path page, where you can define path criteria and escalation parameters, such as whether to notify the requester's supervisor.

Criteria Click to access the Criteria Definition page, where you can define user and field criteria along with monetary and application class criteria for this stage.

Steps

Step Enter the sequence in which you want this step performed during the approval process.

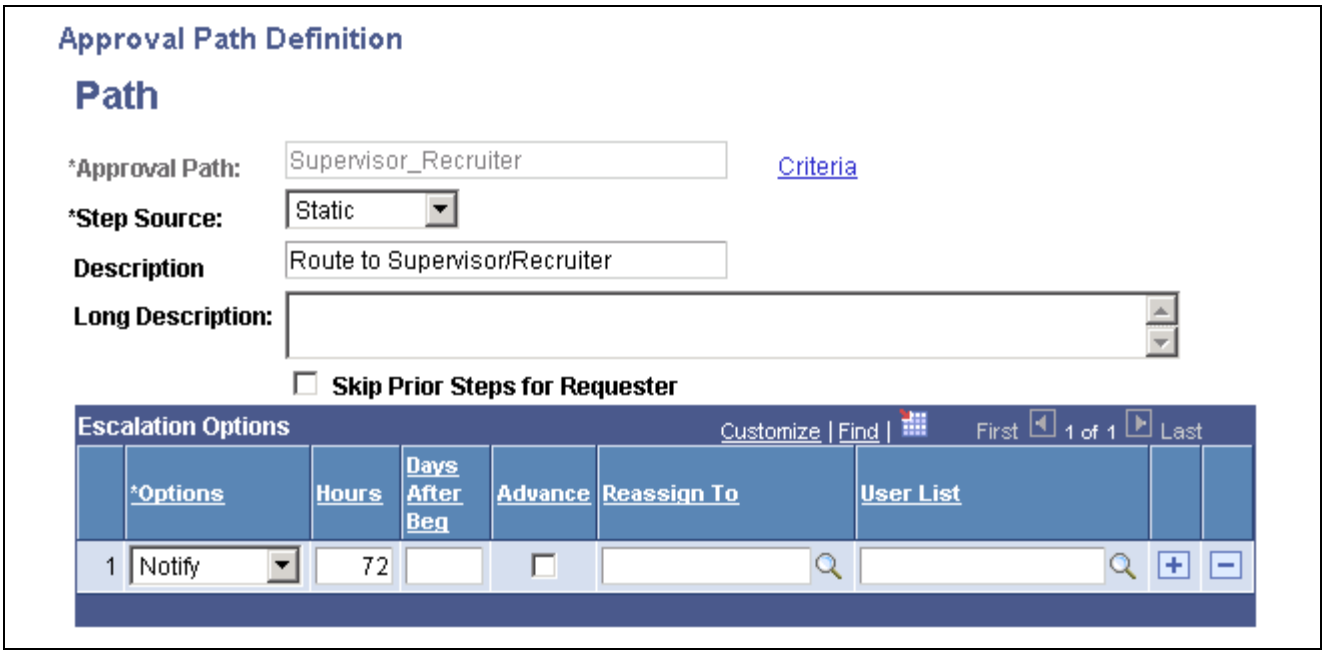
Approver User List Select the type of approver that you want to use for this step. A user list is an entity which groups users in the system. Roles, queries, and application classes are examples of user lists. The system uses the list and its users to run automated business processes. The list defines the user sources who can be used in approval steps.

Step Details Click to access the Step page, where you can define approver requirements, self approval details, and reviewers.

Criteria Click to access the Criteria Definition page, where you can define user and field criteria along with monetary and application class criteria for this stage.

Setting Up Approval Paths

Access the Approval Path Definition - Path page.



Approval Path Definition - Path page

Approval Path Displays the path name that you are creating or updating.

Criteria Click to access the Criteria Definition page, where you can define user and field criteria, along with monetary and application class criteria for this stage.

Step Source Select the method by which steps are instantiated during the approval process. Values are:

Static: Select to indicate that you want the system to use the individual user-defined steps when it processes an approval.

Dynamic: Select to indicate that you want the system to use either a query or an application class when it processes an approval. When you initialize the process, you select the query or class on which to base the approval. The system performs an iterative call to the query or class until the call does not return an approver. When using the Dynamic source, the system doesn't consider criteria and user roles that are associated with an approval process. Instead, it uses the user list that is created by an application developer on which to initialize the process.

Skip Prior Steps for Requester Select to indicate that all approval steps in this path prior to the requester's step are bypassed.

Escalation Options

Use this group box to define time elements for when an approver takes too long to approve or deny a pending request.

Options Select the action to be taken when an approver takes too long to approve or deny a pending request. Values are:

Advance: Select to send the request on to the next approver after the days and hours for this approval step have ended.

Notify: Select to notify the approver after the days and hours for this approval step have ended.

Reassign: Select to reassign the request on to the next approver after the days and hours for this approval step have ended.

Hours Enter the number of hours a transaction can remain at one workflow step before being escalated. This field is combined with the Days After Beg (day after beginning) field to determine the total time an approver has to take action on an approval request.

Days After Beg (day after beginning) Enter the number of days a transaction can remain at one workflow step before being escalated. This field is combined with the Hours field to determine the total time an approver has to take action on an approval request.

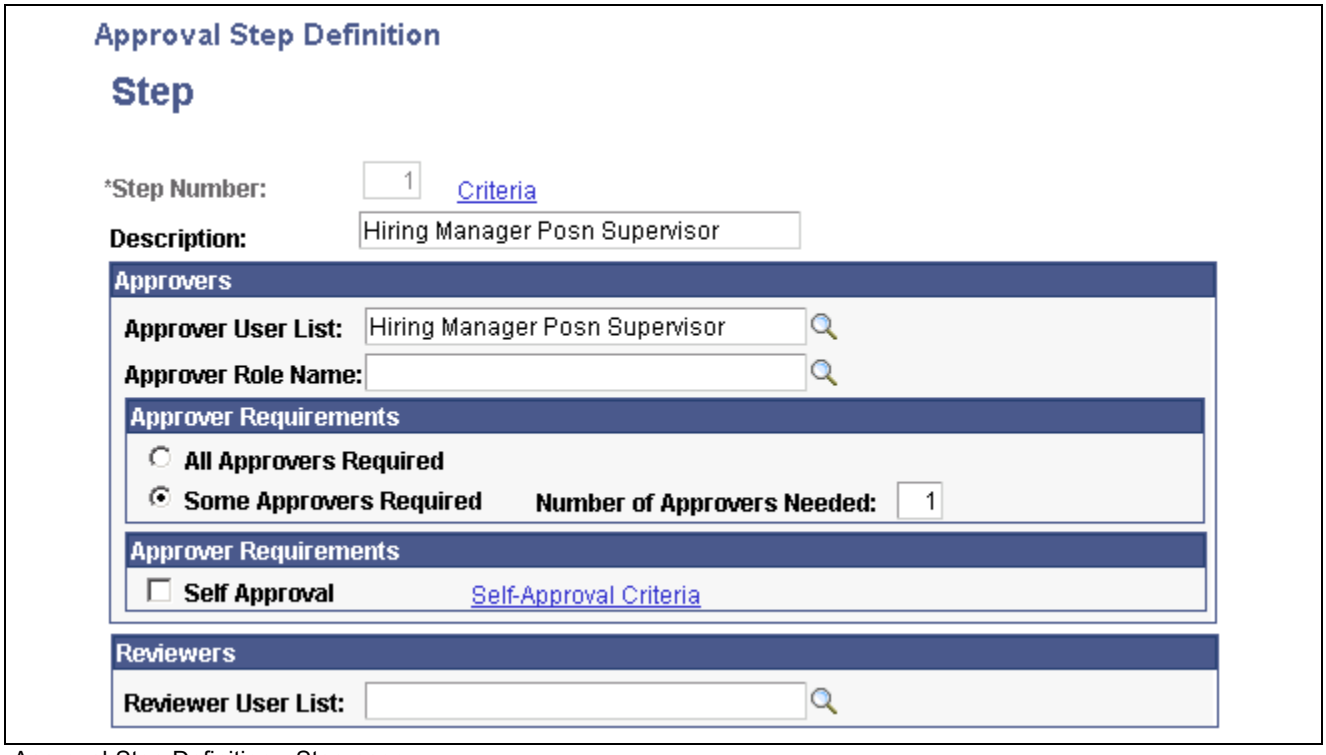
Advance Select to advance the request to the next approver in the approval chain.

Reassign To If you selected *Reassign* in the Options field, select the person to who you want to reassign the request.

User List If you select *Notify* in the Options field, select the user list that defines which user will receive a notification.

Defining Approval Steps

Access the Approval Step Definition - Step page.



Approval Step Definition - Step page

Step Number Enter the number for this step. It's the sequence in which an approval is routed. Each step typically represents a routing to an approver. However, you can route to multiple approvers or reviewers in a step as well.

Criteria Click to access the Criteria Definition page, where you can define user and field criteria along with monetary and application class criteria for this stage.

Approvers

Approver User List Select the type of approver you want to use for this step. You use a user list to map users to certain functional roles. The system then uses the list and its users to run automated business processes. The list defines the user sources who can be used in approval steps.

Approver Role Name Select a role that specifies the authority that a user has. The approval workflow engine filters approvers who are returned by the user list for this role. It also enforces the role at the time the approver acts. If the role assignment changes, such as the approver is no longer in the role, the approver is blocked from acting on the requisition.

Approver Requirements

All Approvers Required Select to indicate that all approvers at this step are required to approve the requisition at this step. You can select to have all approvers or some approvers approve the requisition at this step.

Some Approvers Required Select to indicate that all approvers are not required to sign off on a requisition. If you select this option, you can define the number of approvers that are required in the Number of Approvers Needed field.

Number of Approvers Needed Enter the minimum number of approvers that you want to sign off for a requisition at this step. When an approval process is defined and this number is not met, the system notifies the system administrator.

Approver Requirements

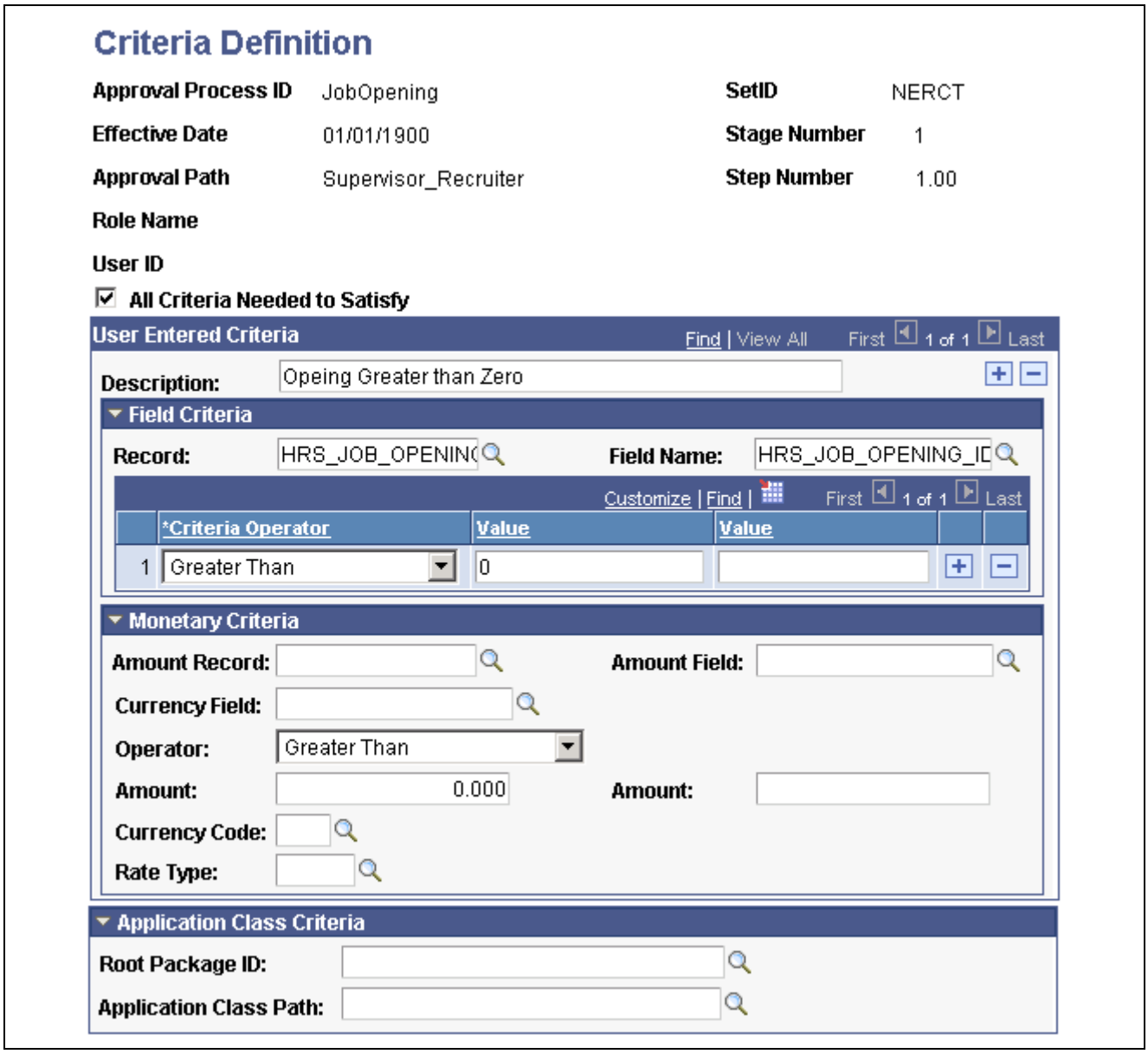
This feature is reserved for a future release.

Reviewers

Reviewer User List Select the type of reviewer that you want to use for this step. You use a user list to map users to certain functional roles. The system then uses the list and its users to run automated business processes. The list defines the user sources who can be used in approval and review steps.

Defining Approval Criteria

Access the Criteria Definition page.



Criteria Definition page

All Criteria Needed to Satisfy Select if you want all the criteria that you set up to be true before the system considers the rules to have been met.

User Entered Criteria

Description Enter a description for this set of criteria.

Field Criteria

Record Select a record that you want to use in defining approval criteria.

Field Name Select a field that you want to use to define approval criteria. The values that you define in the remaining field criteria grid are those that are used in determining the approval criteria.

Criteria Operator Determines the action that the system applies to the criteria that you enter in the Value fields. Values are:

Between: Use only values that are between the two values that you enter as criteria.

Equals: Use only values that are equal to the entered criteria

Greater Than: Use values that are equal to or greater than the entered criteria.

Is Blank

Is Not Blank

Less Than: Use any record value that is less than the value entered in the Criteria Operator field.

Not Equal To: Use any value that is not equal to the two values that you enter as criteria.

Value Used when you select the operator *Not Equal To* to define a range to which you want the operator to apply.

Value Used when you select the operator *Not Equal To* to define a range to which you want the operator to apply.

Monetary Criteria

Use this section to establish approval criteria for requisition amounts.

Amount Record Select the record name for the system to use when comparing the requisition to the minimum amount required to trigger the step.

Amount Field Select the field within the amount record for the system to use when comparing the requisition to the minimum amount required to trigger the step. The system uses the value that you select to evaluate the Amount field.

Currency Field Select the currency field that corresponds to the currency code that you select in the Currency Code field.

Operator Select a value that determines how the system processes the values in the Amount fields. Values include *Between, Greater Than,* and *Less Than.*

Amount Use this field to define an amount range for use with the Operator field. In the first field, enter the minimum amount that is required on the requisition to trigger the step. If no amount is specified, zero is considered the minimum.

Amount Define an amount range for use with the Operator field.

Currency Code Select the monetary unit that you want to use for the approval.

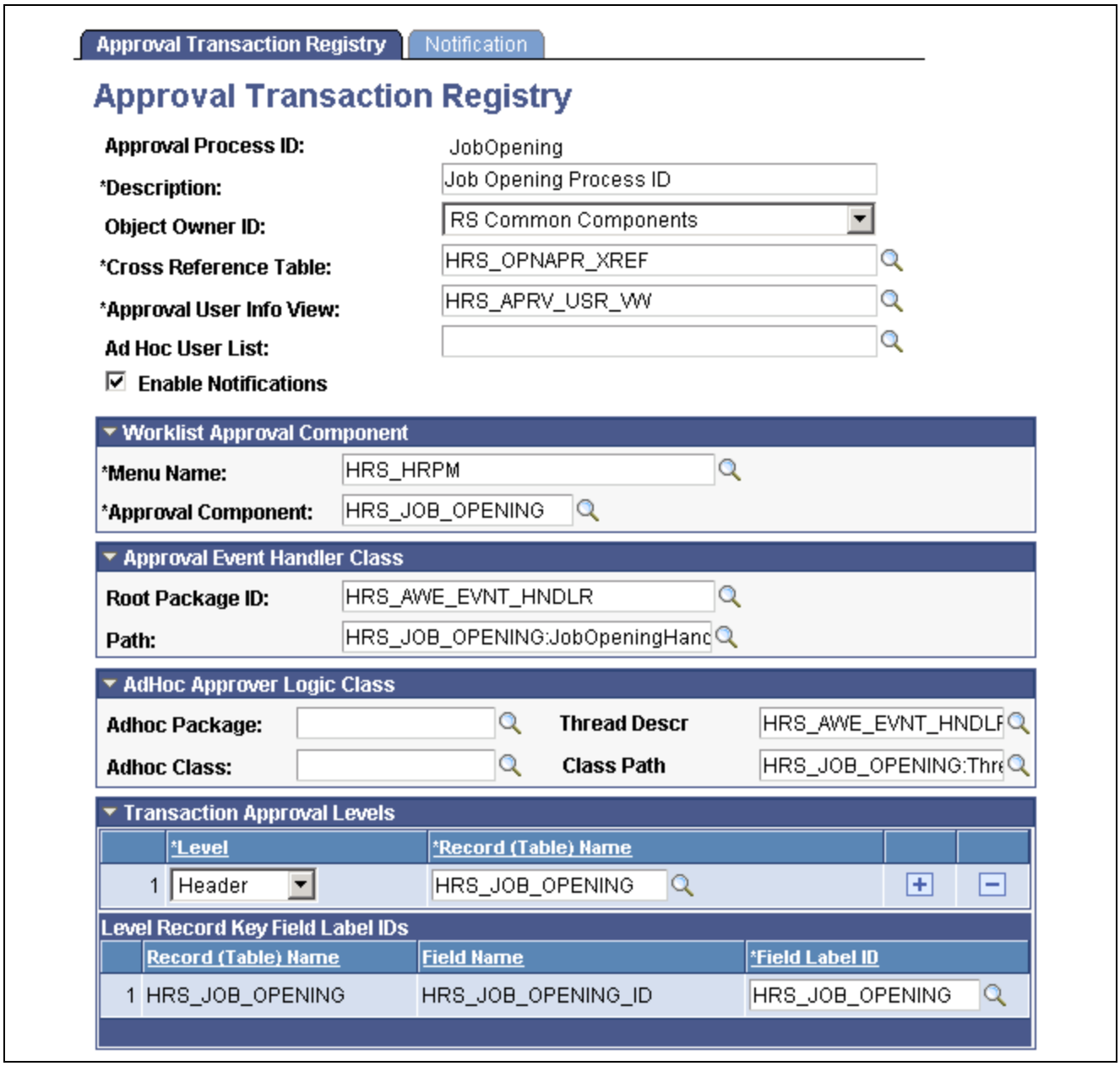
Rate Type Select how the system arrives at the currency value, such as the current rate or a financial rate.

Application Class Criteria

Use this section to assign application packages as criteria for the approval process definition. When you define a class, the system uses it along with other criteria that you enter to process the approval.

Registering Approval Transactions

Access the Approval Transaction Registry page.



Approval Transaction Registry page

The approval transaction registry is the interface application that developers use to register an application with the approval workflow engine. Transactions are processes that PeopleTools perform for applications. Transactions that require approvals are candidates for being linked to the approval workflow engine. You use the Approval Transaction Registry page to link the components, event handler, records, and classes that you created to the approval process for an application transaction, such as a job opening or job offer. Application developers register the main records and components that make up the transaction.

Approval Process ID Enter a name that the system uses to track this approval workflow process for a transaction. You can also enter a description for the approval process.

Object Owner ID Select the PeopleSoft application to which this object belongs.

Cross Reference Table Select the table that is used to manages application specific transaction records and associate them with the approval process runtime instances.

Approval User Info View (approval user information view) Select the table from which you want to extract personal contact information for the approver. This is the information that appears when you use the approval status monitor to display personal information. These values are set up in the Application Designer.

Ad Hoc User List Define a user list to be used for additional adhoc approvers that are manually added to the approval process

Enable Notifications Select to have the Approval Engine send out email notifications.

Worklist Approval Component

Menu Name Select the menu name that contains the component that you want the notification recipient to link to. This identifies where the person should go upon notification. If you do not enter values, the recipient is sent to the same menu and component that is defined for the worklist.

Approval Component Select the component on which the approval is going to be based. You must also create a uniform resource locator (URL) to send to the job opening or job offer approval page for the job opening.

Approval Event Handler Class

Root Package ID Select the parent application class through which events are exposed. This defines the action to take based on events.

Path Select a path that uses a specific class within the root package.

AdHoc Approver Logic Class

Adhoc Package Select the ad hoc application class package that you want to use for approvals for a particular purpose.

Thread Descr (thread description) Select a thread description that will be used to identify the description that is used for the status monitor display.

Adhoc Class Select the ad hoc application class path. This defines more specific classes for approvals for a particular purpose.

Class Path Identify the class path for the thread description class.

Transaction Approval Levels

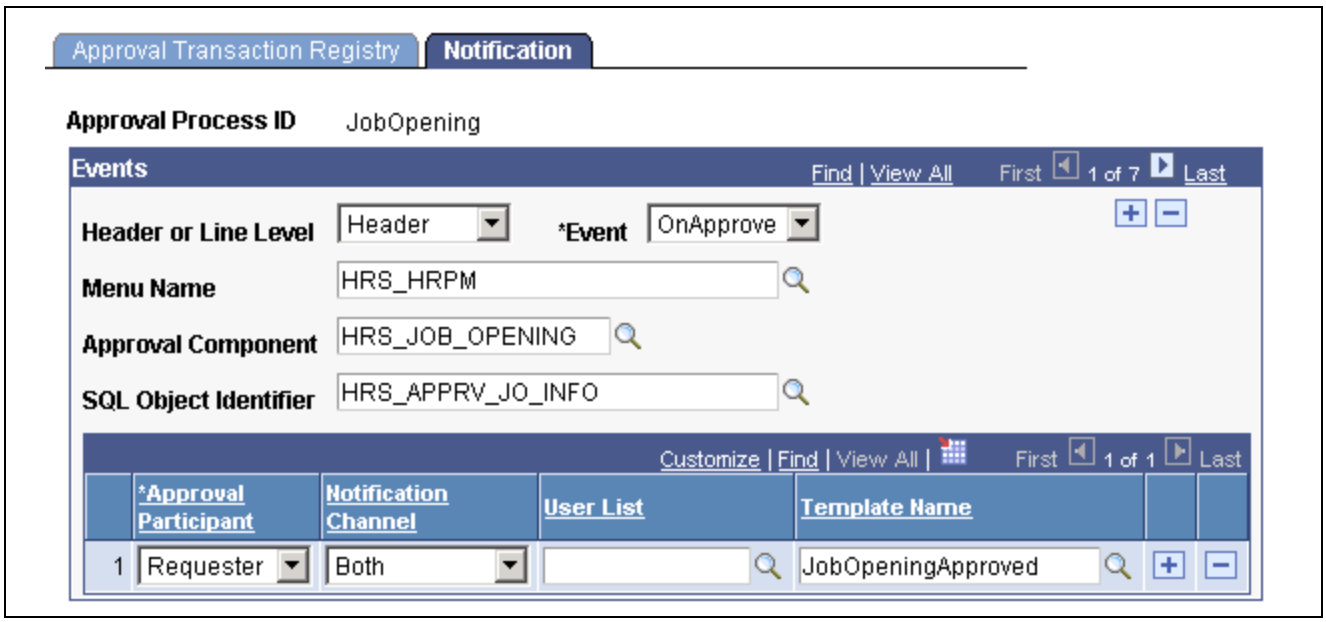
Use this group box to define whether the transaction is to be approved at the header or line level and what level the application supports. You define:

- The levels that are enabled by the application for approvals.

  The first row will always be the header level.
- The database table that represents this transaction level.

Defining Approval Notifications

Access the Approval Transaction Registry - Notification page.



Approval Transaction Registry - Notification page

Events

Header or Line Level Defines whether the notification event is at the header or line level. All events in HCM are at the header level.

Event Select the event for which you want to send a notification. By default, the approver is always notified of an event, and when an error occurs the system notifies the requester and the system administrator. Event values are:

Ad Hoc Del (ad hoc delete)

Ad Hoc Ins (ad hoc insert)

Approve

Back

Complete

Error

Escalate

Launch

OnApprove

OnDeny

Reactivate

Reassign

Review

Terminate

Menu Name	Select the menu name that contains the component that you want to register for the Worklist. A menu is a collection of components that contain pages. The menu is the highest level in the hierarchy, and you use the menu to access pages.
Approval Component	Select the component on which the approval is going to be based. You must also create a URL to send to the requisition approval page for the requisition
SQL Object Identifier	Select the object identifier that you want to use to get content for the email.
Approval Participant	Identify the participant that receives the notification. Values are: *Admin* (administrator) *Approvers* *Dynamic* *Requester* *Reviewers* *User List*
Notification Channel	Identify the method of notification. Values are: *Both* *Email* *None* *User* *Worklist*
User List	If *User List* is selected in the Approval Participant field, this is the user list that is defined.
Template Name	Select the template that is used to send the email.

Processing Escalations and Timeouts

Access the Escalations and Timeouts page.

The HRS_ESCL Application Engine process processes all approvals that meet the criteria that you defined in the Escalation Options group box on the Approval Path Definition - Path page for a given approval process ID and setID combination.

Approval Process ID and **SetID**	Select an approval process ID or setID to run the process for a specific approval process ID and setID combination.

Click Run to run this request. PeopleSoft Process Scheduler runs the HRS_ESCL process at user-defined intervals.

See Also

PeopleTools 8.45 PeopleBook: Using PeopleSoft Applications

CHAPTER 7

Creating Employee Referral Programs

This chapter provides an overview of employee referral program setup steps and discusses how to:

- Set up employee eligibility rules.
- Set up award category rules.
- Set up employee referral programs.

See Also

Chapter 19, "Managing Employee Referral Programs and Hot Jobs," page 393

Understanding Employee Referral Program Setup Steps

This section lists a common element and discusses employee referral program setup steps.

Common Element Used in This Chapter

Referral Program ID Displays the identification code that you assign when you define an employee referral program. It is a key field for many of the pages addressed in this chapter.

Employee Referral Program Setup Steps

To set up employee referral programs:

1. Set up employee eligibility rules by using the Employee Eligibility Rules (HRS_RULE_ELIG) component.

   See Chapter 7, "Creating Employee Referral Programs," Setting Up Employee Eligibility Rules, page 130.

2. Set up award category rules and schedules by using the Award Category Rules (HRS_RULE_AWD) component.

   See Chapter 7, "Creating Employee Referral Programs," Setting Up Award Category Rules and Schedules, page 133.

3. Set up employee referral programs by using the Employee Referral Program (HRS_REF_PGM) component.

   See Chapter 7, "Creating Employee Referral Programs," Setting Up Employee Referral Programs, page 137.

4. Associate a employee referral program with a recruitment template on the Recruitment Template page.

This enables the system to automatically associate a referral program with a job opening when the job opening is created using that Recruitment Template. In turn, the system uses this employee referral program's rules to use to evaluate eligibility and pay awards for the job opening.

See Chapter 3, "Setting Up Recruiting Templates," Setting Up Recruitment Templates, page 50.

5. Set up an Employee type recruitment source by using the Source Setup (HRS_SOURCE_SETUP) component.

   When an applicant applies for a job online, they can specify referral information in the Referral Information group box if you include the Referrals section in the resume template for that job opening. If they select an Employee type recruitment source as the referral source, additional fields appear in the group box that enable applicants to specify information for the employee that referred them, such as the employee's name, email address, and whether that employee is a member of their family.

See Also

Chapter 5, "Setting Up Third Party Integrations," Setting Up Recruitment Sources, page 97

Chapter 19, "Managing Employee Referral Programs and Hot Jobs," Submitting, Confirming, and Reviewing Referrals, page 414

Setting Up Employee Eligibility Rules

To set up employee eligibility rules, use the Employee Eligibility Rules (HRS_RULE_ELIG) component.

This section provides an overview of employee eligibility rules and discusses how to:

- Name and describe employee eligibility rules.
- Create SQL statements for employee eligibility rules.

Understanding Employee Eligibility Rules

Employee eligibility rules define the conditions under which an employee is eligible for award payment under the employee referral program. For example, you might want to limit eligibility to employees who work in a particular geographic area or type of job. You might want to exclude employees in certain departments or locations. You can create a rule that combines a number of criteria to determine employee eligibility.

To set up employee eligibility rules:

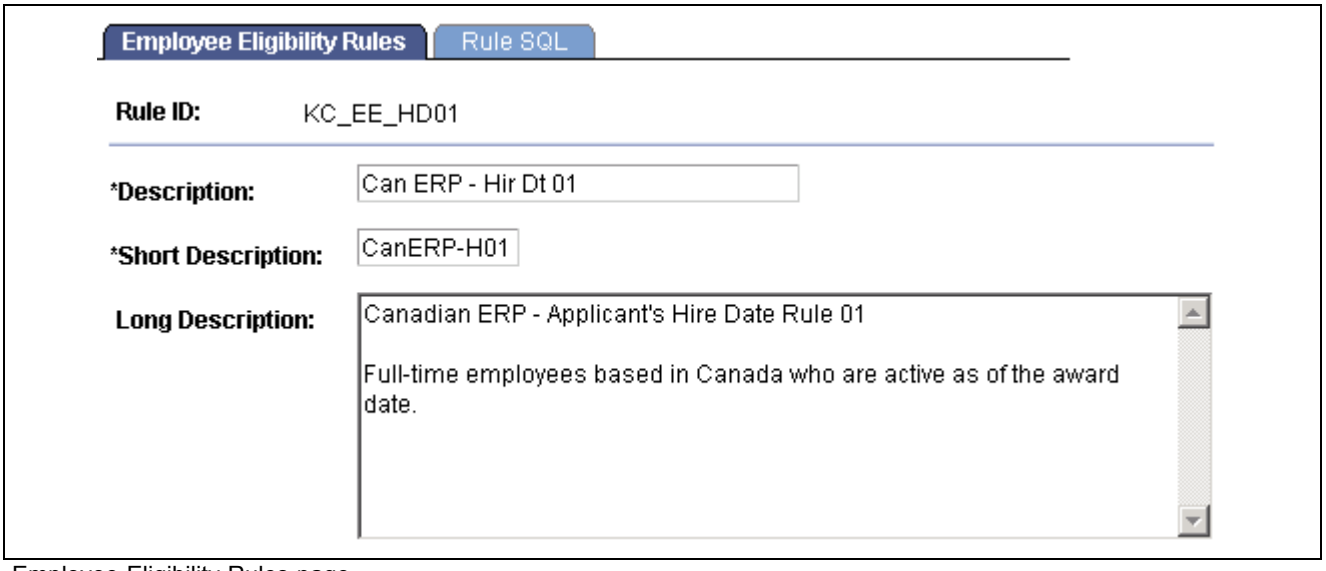
1. Name and describe the employee eligibility rule on the Employee Eligibility Rules page.
2. Create SQL statements for the employee eligibility rule on the Employee Eligibility Rules - Rule SQL page.

Pages Used to Create Employee Eligibility Rules

Page Name	Object Name	Navigation	Usage
Employee Eligibility Rules	HRS_RULE_DEF	Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Employee Eligibility Rules, Employee Eligibility Rules	Name and describe employee eligibility rules.
Employee Eligibility Rules - Rule SQL	HRS_RULE_SQL	Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Employee Eligibility Rules, Rule SQL	Create SQL statements for employee eligibility rules.
View SQL	HRS_VW_SQL	• Click the View SQL link on the Employee Eligibility Rules - Rule SQL page. • Click the View SQL link on the Award Category Rules - Rule SQL page. • Click the View SQL link on the Hot Job Administration - Selection page.	View a SQL statement that the system generates from information that you enter on the Employee Eligibility Rules - Rule SQL page.

Naming and Describing Employee Eligibility Rules

Access the Employee Eligibility Rules page.

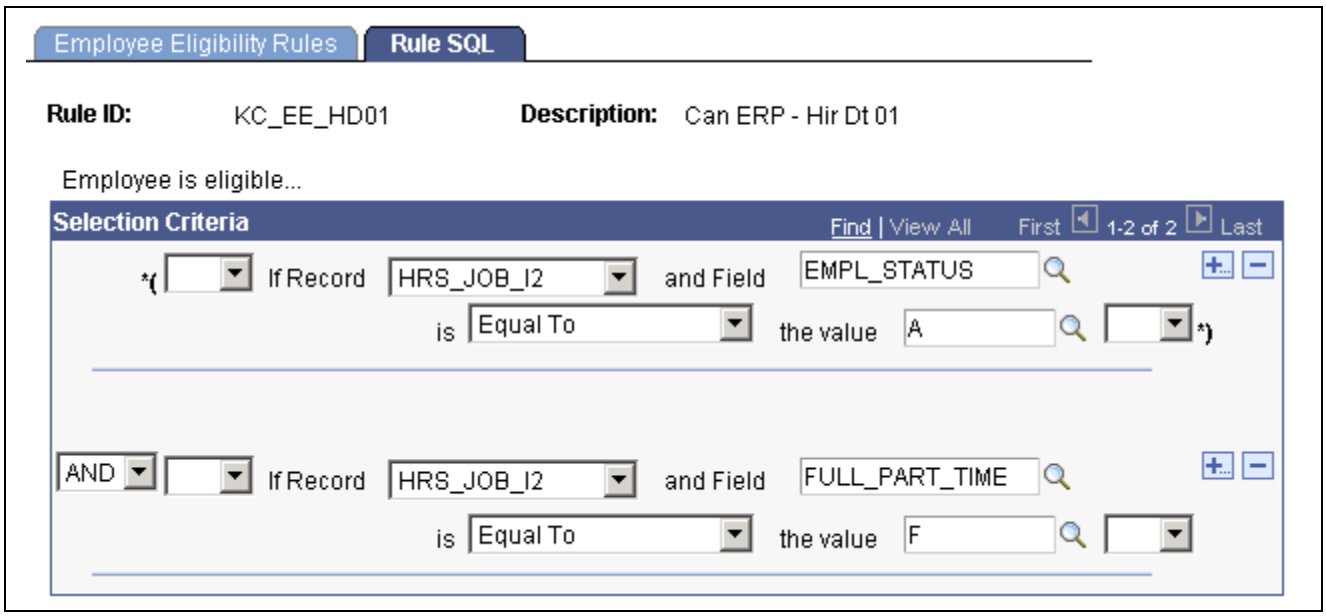


Employee Eligibility Rules page

Long Description Enter a description of the employee eligibility rule. This description appears on the Employee Eligibility Rule page in the Employee Referral Program component.

Creating SQL Statements for Employee Eligibility Rules

Access the Employee Eligibility Rules - Rule SQL page.



Employee Eligibility Rules - Rule SQL page

Note. You do not have to create a rule stating that the applicant must have an active employee status on the award date. This rule is already built into the system.

To construct a rule:

1. Select open parentheses.

   You can select from zero to five open parentheses to group lines as needed.
2. Select a record.

   You can select the HRS_EMPLOYMT_I or HRS_JOB_I2 or record.
3. Select a field from the selected record.

   Only valid fields for the record that you select appear as values in the system prompt.
4. If setID is a key for the record and field that you selected,.select a setID in the SetID field.

   The SetID field does not appear if setID is not a key.
5. Select an operand.

   Values are:

   - *Equal To*
   - *Greater Than*
   - *Greater Than or Equal to*
   - *LIKE*
   - *Less Than*
   - *Less Than or Equal To*
   - *Not Equal To*

6. Enter a value that corresponds with the record, field, and operand that you selected.

   You can enter either a static string or select a value from a list of valid values for the field.
7. Select from zero to five close parentheses.
8. (Optional) Add a row to continue the rule definition.

   When you add a row, select the operand *AND* or *OR* in the first field in the new row.

Click the View SQL link to access the View SQL page, where you can view the SQL generated by the values that you entered for this rule definition.

Setting Up Award Category Rules and Schedules

To set up award category rules, use the Award Category Rules (HRS_RULE_AWD) component.

This section provides an overview of award category rules and schedules and discusses how to:

- Name and describe award category rules.
- Create SQL statements for award category rules.
- Set up award schedules.

Understanding Award Category Rules and Schedules

When you define the award category rules, you're defining the job openings that qualify for awards in the category and the amounts and timing of awards for the category. You can create any number of award categories, each with an award schedule. The job opening that the applicant is hired into determines the award category for the referring employee's award.

You should set up categories so that each job opening (for which you want to have an employee referral program award) falls into only one category. Job openings that do not fall into any category cannot be processed for employee referrals.

To set up award category rules:

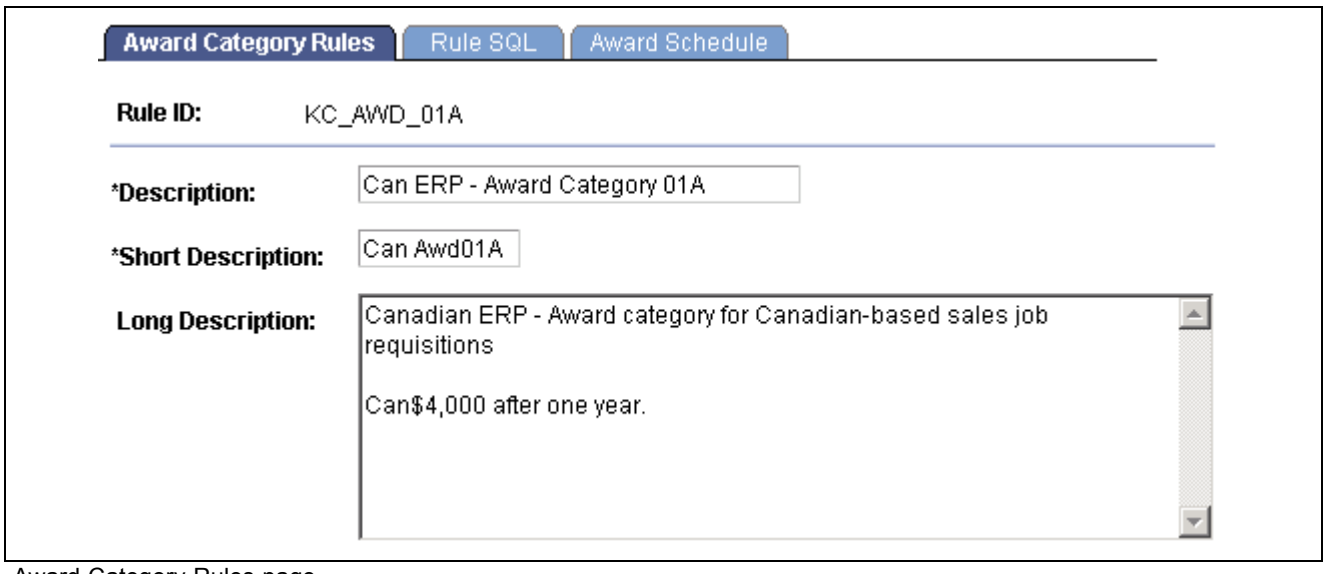
1. Name and describe the award category rule on the Award Category Rules page.
2. Create SQL statements for the employee eligibility rule on the Award Category Rules - Rule SQL page.
3. Define the amounts, timing, and earnings code for the rule on the Award Schedule page.

Pages Used to Set Up Award Category Rules and Schedules

Page Name	Object Name	Navigation	Usage
Award Category Rules	HRS_RULE_DEF	Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Award Category Rules, Award Category Rules	Name and describe award category rules.
Award Category Rules - Rule SQL	HRS_RULE_SQL	Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Award Category Rules, Rule SQL	Create SQL statements for award category rules.
View SQL	HRS_VW_SQL	• Click the View SQL link on the Employee Eligibility Rules - Rule SQL page. • Click the View SQL link on the Award Category Rules - Rule SQL page. • Click the View SQL link on the Hot Job Administration - Selection page.	View a SQL statement that the system generates from information that you enter on the Employee Eligibility Rules - Rule SQL page.
Award Schedule	HRS_RULE_AWD_SCH	Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Award Category Rules, Award Schedule	Set up award schedules.

Naming and Describing Award Category Rules

Access the Award Category Rules page.

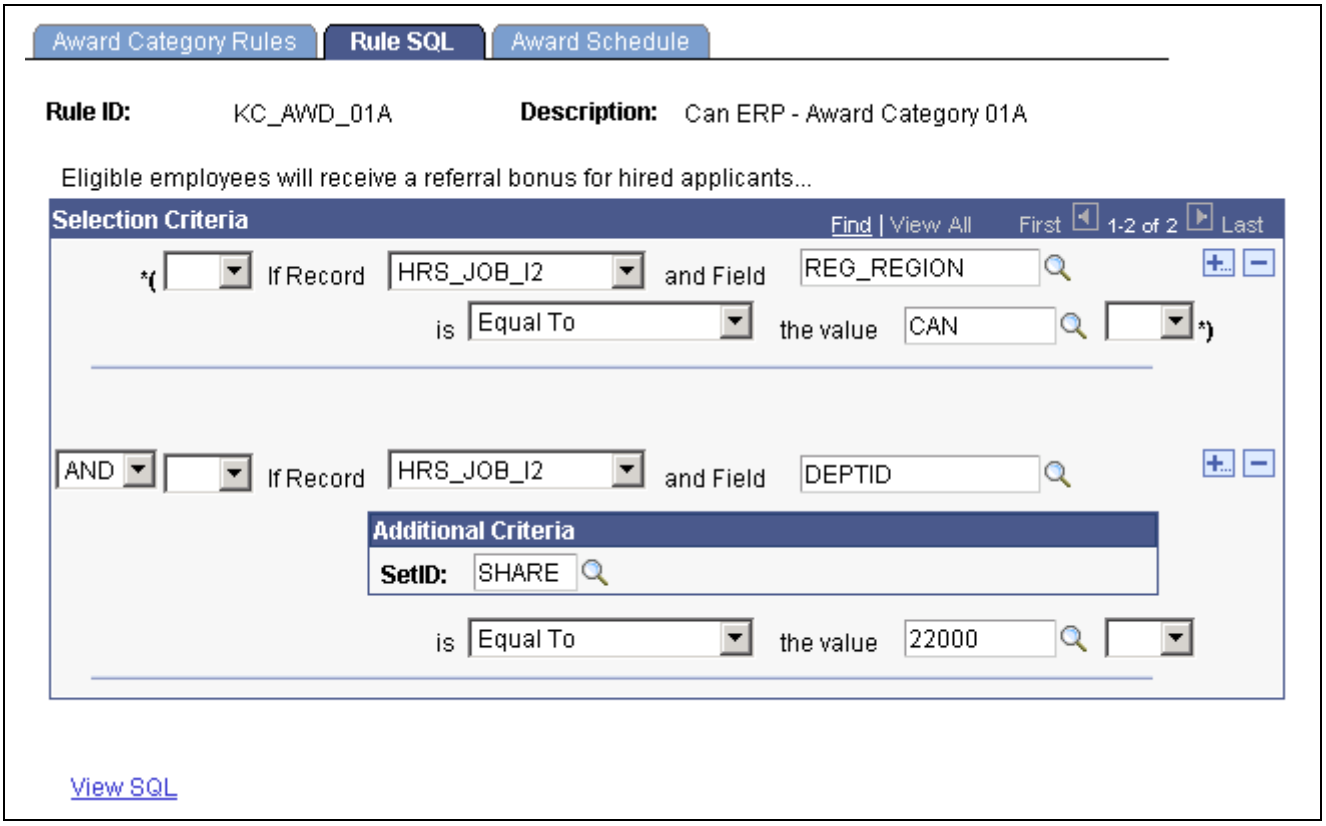


Award Category Rules page

Long Description Enter a description of the award category rule. This description appears on the Award Category Rule page in the Employee Referral Program component.

Creating SQL Statements for Award Category Rules

Access the Award Category Rules - Rule SQL page.



Award Category Rules - Rule SQL page

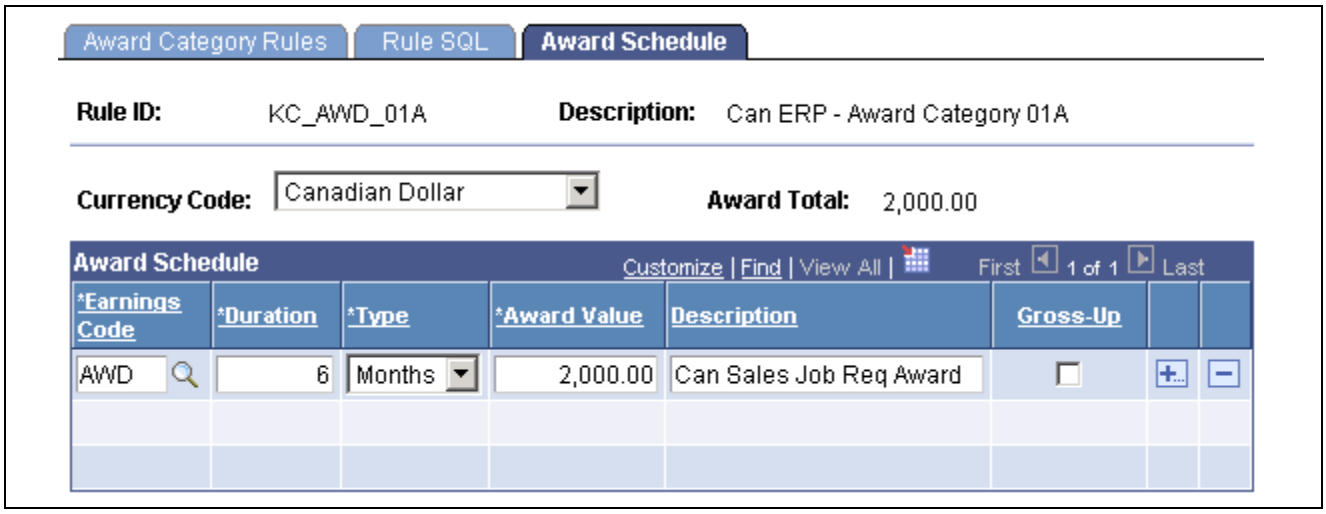
The steps that you use to construct a rule are the same as the steps that you use on the Employee Eligibility Rules - Rule SQL page.

For award category rules, the records are HRS_EMPLOYMT_I, HRS_JOB_I2, HRS_JO_I, or HRS_PSTBTH_I.

See Chapter 7, "Creating Employee Referral Programs," Creating SQL Statements for Employee Eligibility Rules, page 132.

Setting Up Award Schedules

Access the Award Schedule page.



Award Schedule page

Currency Code Select the currency that is used to define awards in this category. Valid values are *Canadian Dollar* and *US Dollar.* You can override the currency on the Referral Award Details page.

Important! Employee referral program rewards are paid to employees in the currency that corresponds to where the employee is located. Recruiting Solutions and PeopleSoft Enterprise Payroll for North America do not provide currency conversion. For example, if you define the award as 100.00 CAD, but the employee that receives the award is normally paid in US dollars, Payroll for North America will pay an award of 100.00 USD to the employee.

Award Total Displays the total of all awards in the schedule. Click the refresh button to update the award total.

Earnings Code If you use the delivered integration with Payroll for North America to pay employee referral award, you must select the earnings code associated with the award. This field appears only if Payroll for North America is installed. Define earnings codes by using the Earnings Table (EARNINGS_TABLE) component.

Duration and **Type** Enter the time period that the referring employee must wait until the award is payable. You can enter the time period in days, months, or years. To calculate the date on which the reward is payable, the system begins with the date that the applicant is hired or rehired and adds the duration time period. This is referred to as the award date and is the date on which the duration requirement is fulfilled; it is not necessarily the date on which the award is paid. If you use the delivered integration with Payroll for North America to pay employee referral award, the system will not send award information before the award date.

Award Value Enter the amount of a cash award or the value of a noncash award.

Gross-Up Select if the award should be grossed up.

Setting Up Employee Referral Programs

To set up an employee referral program, use the Employee Referral Program (HRS_REF_PGM) component.

This section lists prerequisites and discusses how to:

- Define employee referral programs.
- Set up additional employee referral program criteria.
- Select employee eligibility and award category rules.

Prerequisites

Before you can define employee referral programs, you must:

1. Set up employee eligibility rules.

   See Chapter 7, "Creating Employee Referral Programs," Setting Up Employee Eligibility Rules, page 130.

2. Set up award category rules.

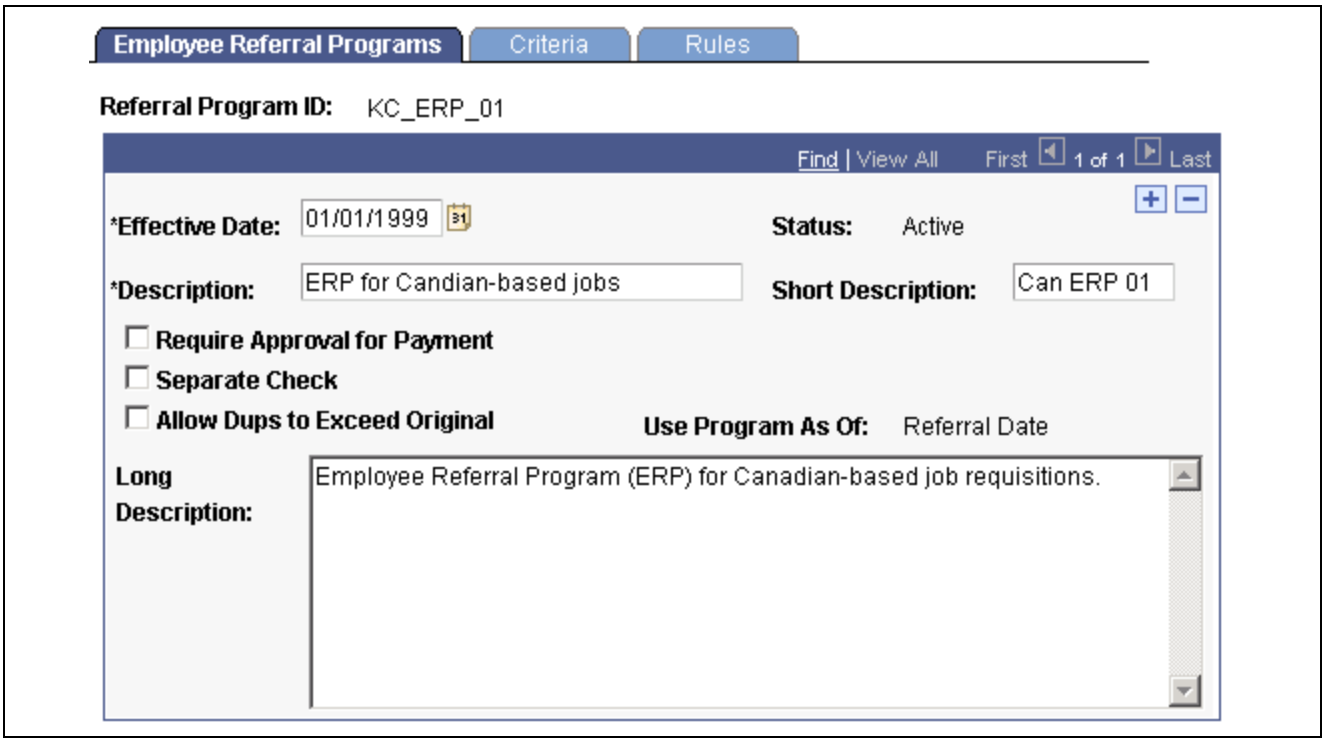
   See Chapter 7, "Creating Employee Referral Programs," Setting Up Award Category Rules and Schedules, page 133.

Pages Used to Define Employee Referral Programs

Page Name	Object Name	Navigation	Usage
Employee Referral Program - Employee Referral Programs	HRS_REF_PGM_PG	Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Employee Referral Program, Employee Referral Programs	Define employee referral programs.
Employee Referral Program - Criteria	HRS_REF_PGM_CRT	Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Employee Referral Program, Criteria	Set up additional employee referral program criteria that are not covered by employee eligibility or award category rules.
Employee Referral Program - Rules	HRS_REF_PGM_RUL	Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Employee Referral Program, Rules	Select employee eligibility and award category rules that are in effect for the program.
Employee Eligibility Rule	HRS_RULE_ELIG_SP	Click the View Description link in the Employee Eligibility Rules group box on the Employee Referral Program - Rules page.	View a description of the employee eligibility rule. The description that you entered in the Long Description field on the Employee Eligibility Rules page appears here.
Award Category Rule	HRS_RULE_AWD_SP	Click the View Description link in the Award Category Rules group box on the Employee Referral Program - Rules page.	View a description of the award category rule. The description that you entered in the Long Description field on the Award Category Rules page appears here.

Defining Employee Referral Programs

Access the Employee Referral Program - Employee Referral Programs page.



Employee Referral Program - Employee Referral Programs page

Effective Date Enter an effective date. The system uses the effective date with the Use Program As Of field to determine the rules that are in effect for a referral.

Require Approval for Payment Select to require approval for an award before the award is sent to the payroll system. Awards that have an Approved status can be submitted for payment. If you select this option, the system assigns a Needs Approval status to an award when the award is created. Users must manually approve the award on the Referral Award Approval page. If you clear this check box, awards are automatically given Approved status when they are created.

Separate Check Select if you want the award paid separately from the employee's regular paycheck. If you are paying awards through Payroll for North America, all grossed-up awards are paid by a separate check.

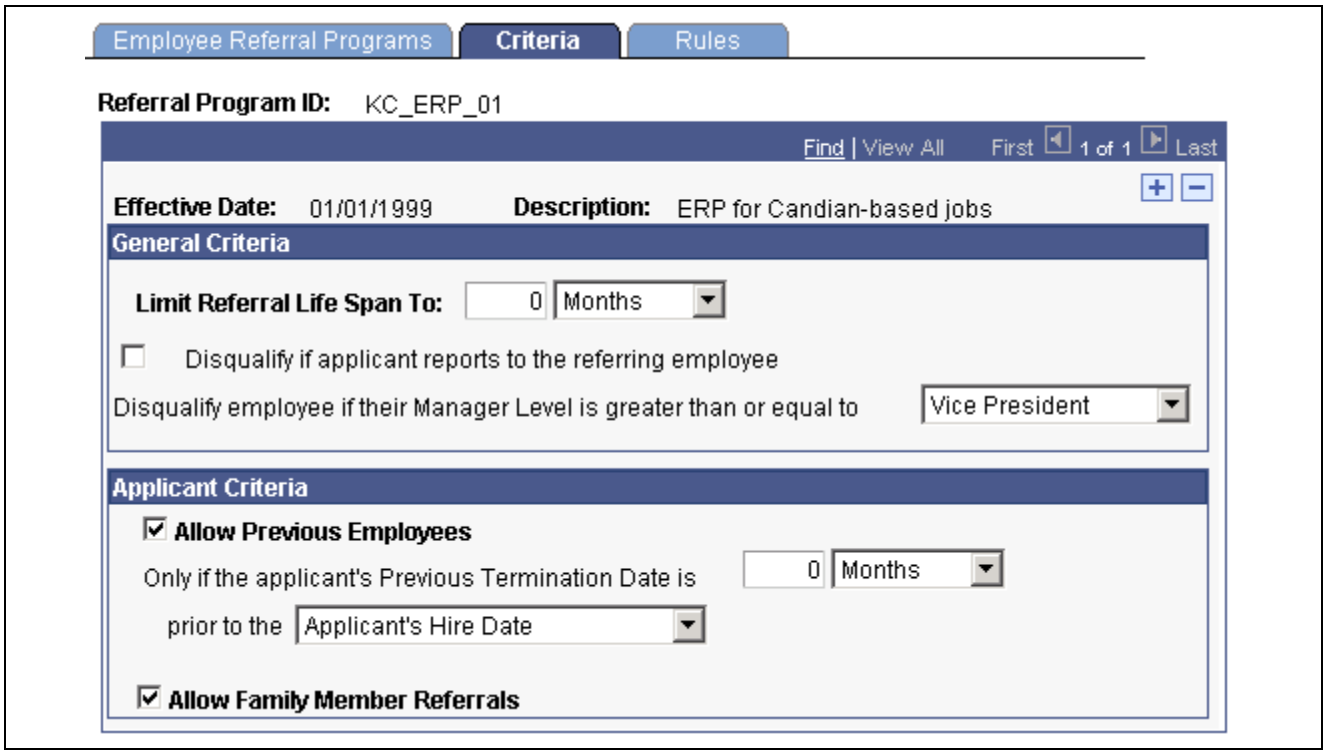
Allow Dups to Exceed Original (allow duplicates to exceed original) Select if the total award can exceed the original award amount when an award is split among several referring employees.

Use Program As Of Select which effective-dated program rules apply to the referral. Valid values are *Applicant's Hire Date* and *Referral Date.* The system applies all program rules that are in the effective-dated row that is active as of the Use Program As Of date. For example, an employee referred an applicant on December 1 and that applicant was hired on February 1 of the following year. However, the ERP rules changed on January 1 from $100 for all successful referrals before January 1 to $1000 for those on or after January 1. If the Use Program As Of field is set to Referral Date, the employee is entitled to only $100 since the referral was made before January 1. If the field is set to Applicants Hire Date, the employee is entitled to $1000 since the applicant was hired after January 1.

Note. This field is only available when a new employee referral program is created. After saving the employee referral program, the value in subsequent effective-dated rows cannot be changed.

Setting Up Additional Employee Referral Program Criteria

Access the Employee Referral Program - Criteria page.



Employee Referral Program - Criteria page

General Criteria

Limit Referral Life Span To The system uses the value that you enter here to determine whether the employee's referral is active at the time the applicant is hired. The life span of the referral must be active for eligibility. The system calculates life span in calendar days. Each time the employee refers the same applicant, the life span begins again. Enter *0* to continue the life span of referrals indefinitely.

Disqualify if applicant reports to the referring employee Select to disqualify employees if the applicant reports to them directly or indirectly based on the department tree structure as of the applicant's hire date. If you use this rule, you must set up the department tree structure in PeopleSoft Enterprise Human Resources.

Disqualify employee if their Manager Level is greater than or equal to Select a manager level. The system disqualifies employees if their manager level is greater than or equal to the value that you select. To make all managers ineligible, select *All Other Positions.* The system evaluates employee levels as of the applicant's hire date. If you use this rule, you must set up the department tree structure in Human Resources.

Applicant Criteria

Allow Previous Employees, Only if the applicant's Previous Termination Date is, and **prior to the**

Select Allow Previous Employees to allow employee referrals of applicants who are previous employees. Complete the other fields to define how long the applicant must have been away from the organization. Enter *0* in the Only if the applicant's Previous Termination Date is field to allow all previous employees to be referred.

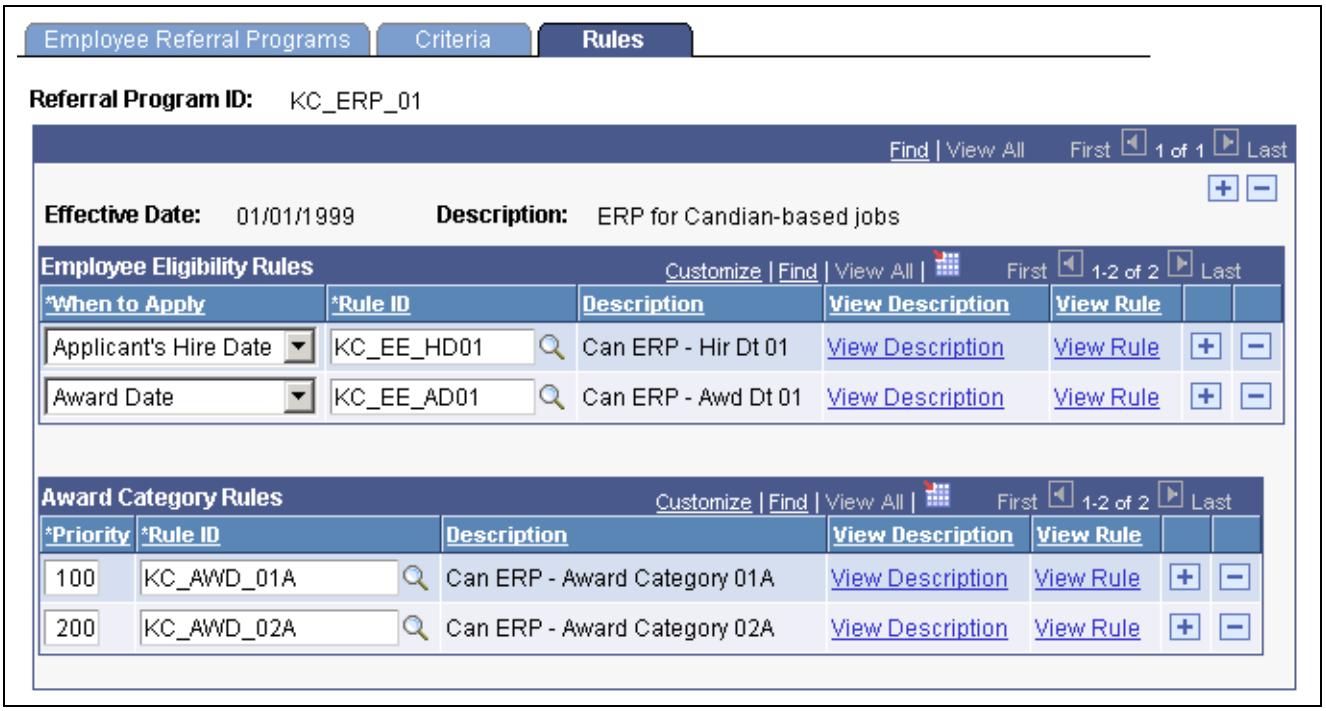
The system evaluates this criteria based on information that users provide when they refer friends online or information that recruiters enter for an applicant on the applicant data pages. It does not check the organization's historical records.

Allow Family Member Referrals

Select to allow employees to refer members of their family.

Selecting Employee Eligibility and Award Category Rules

Access the Employee Referral Program - Rules page.



Employee Referral Program - Rules page

Employee Eligibility Rules

When to Apply

Select when to apply each employee eligibility rule that you associate with this program. Valid values are *Applicant's Hire Date, Award Date,* and *Referral Date.* You can select each of the three values only once for a maximum of three rows. The system uses the rule that you associate with the award date to check eligibility before paying any award in the award category award schedule or in a hot job award schedule.

This field enables you to apply different employee eligibility rules at different points in the referral process. For example, you might want to apply strict

employee eligibility rules at the time that the applicant is hired, but on the award date, you might only require that the employee have an Active status.

Rule ID and **Description** — Select the rule that you want to apply. The system populates the Description field automatically. Valid values are the rules that you set up in the Employee Eligibility Rules component.

View Description — Click to access the Employee Eligibility Rule page, where you can view the description that you entered in the Long Description field on the Employee Eligibility Rules page.

View Rule — Click to access the Employee Eligibility Rules component, where you defined the employee eligibility rule. Use your browser's back button to return to the Employee Referral Program - Rules page.

Award Category Rules

Priority — Enter an integer in this field to tell the system in what order to process the award category rules. The system checks the job opening that the applicant is hired into against the category rules in the priority order. As soon as it finds the job opening in a category, it stops processing that job opening and applies the award schedule for that category.

You should make the award category rules mutually exclusive so that a job opening does not fall into multiple categories.

The system does contain safeguards against paying an employee in multiple award categories for the same applicant.

If a job opening does not fall into any award category, no awards are scheduled or paid.

Rule ID and **Description** — Select the rule that you want to apply. The system populates the Description field automatically. Valid values are the rules that you set up in the Award Category Rules component. You can assign as many rules to the program as you want, each with a unique priority number. Do not select the same rule more than once.

View Description — Click to access the Award Category Rule page, where you can view the description that you entered in the Long Description field on the Award Category Rules page.

View Rule — Click to access the Award Category Rules component, where you defined the award category rule. Use your browser's back button to return to the Employee Referral Program - Rules page.

CHAPTER 8

Creating Job Openings

This chapter discusses how to:

- Create teams.
- Create job openings.
- Create job openings from open positions.
- Clone job openings.
- Approve job openings.

Creating Teams

This section provides an overview of teams and discusses how to create teams.

Understanding Teams

It may be necessary to associate a group of recruiters, hiring managers, or interviewers to a job opening. Assigning teams to a job opening when it is created can help expedite the recruiting process. When you create a job opening, you have the option of entering a team or individuals to the following areas:

- Recruiters.
- Hiring Managers.
- Interviewers.
- Interested Party.

When a team is added to the job opening, the team ID does not actually get added to the job opening. Instead, users who currently belong to the team are added individually to the job opening. Only active teams can be added to a job opening. If a team is made inactive after it has been assigned to a job opening, it continues to be assigned to the job opening. Administrators can remove a team or an individual within a team from a job opening at any time and those affected individuals will not longer have access to that job opening.

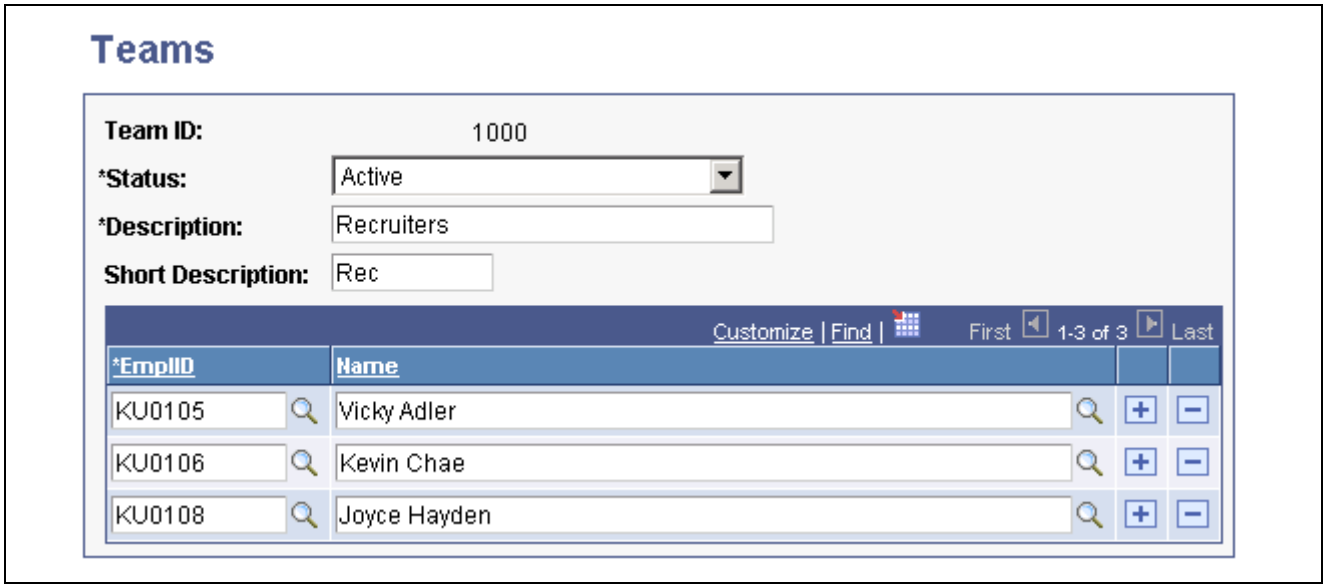
There is no limit to the number of teams you create, nor to the number of teams to which an employee can belong.

Pages Used to Setup and Manage Teams

Page Name	Object Name	Navigation	Usage
Teams	HRS_TEAM	Recruiting, Administration, Teams, Teams	Create and maintain teams.

Creating Teams

Access the Teams page.



Teams page

Team ID Displays the ID assigned to the team.

Status Specify whether this team is *Active* or *Inactive*.

EmplID Select the employee ID for the people that you want to be members of this team.

Creating Job Openings

This section provides an overview of how to create job openings, lists prerequisites, and discusses how to:

- Enter primary job opening information.
- Enter job opening details.
- Add locations to job openings.
- (USF) Enter candidate name requests.
- Add screening criteria to screening levels.
- Define competency points.
- Add job posting details.

Understanding How To Create Job Openings

To create a new job opening, you use the Create a New Job Opening (HRS_JO_LAUNCH) component.

When you create a new job opening, you have the option of creating two types of job openings:

- Continuous job openings are job openings that require only a job posting title.

  They do not require a job code or position number. They can be used as a place holder for possible candidates. This type of job opening does not require a closing date because it represents those jobs for which your organization is always hiring. The job posting could potentially remain open for an indefinite amount of time. Also, if your company uses PeopleSoft Enterprise Performance Management, continuous job openings are not used in time to fill reporting.

- Standard requisitions are specific jobs or positions that you want to fill.

  They require specific data regarding the job or position code.

If you clone a job opening, it is automatically assigned the same type as the original job opening. After the job opening is submitted, applicants can apply for the job opening and you can begin the recruitment process.

If you are using approval processing for job openings, they must be approved before the recruitment process can begin.

The first page that displays is Enter Primary Job Opening Information. It is used to identify basic information about the job opening. The segmenting value entered in the Template Segmenting Type field on the Recruiting Installation - Installation Options page appears as a field on this page.

To identify which recruitment template to associate with the job opening, the system compares the value selected for the segmenting type entered on this page to the segmenting values entered on the recruitment template. The recruitment template that has segmenting values that match the information entered on the Enter Primary Job Opening Information page becomes the recruitment template assigned to the job opening.

For example, if Job Family is selected as the template segmenting type on the Recruiting Installation - Installation Options page, the field Job Family appears on this first page. The job family that you entered is used to find the recruitment template associated to that particular job family when the recruitment template is displayed.

If you are using approvals for job openings designated as a continuous job opening and the segmenting value type is either company or job family, you must enter a job code, position number, business unit, or department so the system can identify the setID.

After the recruitment template is identified, complete the detailed information about the job opening, including posting information. Job posting information consists of the posting title, one or more posting description types, and one or more posting destinations.

After you have entered the job opening information, you can submit the job opening or save it as a draft. If you select Save as Draft, the job opening status is set to draft. If you select Submit, the job opening status is set to:

- Pending approval, if you require approval for job openings.

  A notification is sent to the person designated as the next approver notifying them that there is a job opening that requires their attention.

- Open, if you do not require approval for job openings.

Define whether the system requires approvals for job opening creation on the Recruiting Installation - Installation Options page.

See Chapter 2, “Setting Up the Recruiting Process,” Defining Recruiting Installation Defaults, page 6.

Prerequisites

Before you can create a job opening, you must:

- Set up the recruiting process.
- Set up recruiting templates.

See Chapter 6, "Working with Approvals," page 115.

See Chapter 3, "Setting Up Recruiting Templates," page 39.

Pages Used to Create Job Openings

Page Name	Object Name	Navigation	Usage
Enter Primary Job Opening	HRS_JO_LAUNCH	Recruiting, Create New Job Opening, Enter Primary Job Opening	Enter primary job opening information.
Job Opening	HRS_JOB_OPENING	Click the Continue button on the Enter Primary Job Opening page.	Enter job opening details.
Job Opening - Locations	HRS_JO_LOC_SEC	Click the Add Additional Locations link on the Job Opening page.	Add locations to job openings.
Candidate Name Requests	HRS_JO_NM_SEC	Click the Candidate Name Request link on the Job Opening page.	(USF) Enter candidate name requests.
Job Opening - Job Opening Screening Criteria	HRS_JO_SCR_DTL	Click the screening level link in the Applicant Screening group box on the Job Opening - Job Opening Details page.	Add screening criteria to screening levels.
Define Competency Points	HRS_JO_SCR_CMP_SEC	Click the Edit Details link in the Screening Requirements group box in the Job Opening - Job Opening Screening Criteria page.	Define competency points.
Job Opening - Posting Information	HRS_JO_PST_DTL_SEC	Click the job posting title link in the Job Postings group box on the Job Opening - Job Opening Details page.	Add job posting details.

Entering Primary Job Opening Information

Access the Enter Primary Job Opening page.



Enter Primary Job Opening Information page

Job Opening Type Select the type of job opening. Valid options are:

Standard Requisition

Continuous Job Opening

Business Unit Select the business unit associated with the job opening. The business unit defaults to the business unit of the person creating the job opening and acts as a filter to the remaining fields on the page.

Company Select the company associated with the job opening. This field appears when the Template Segmenting Type field on the Recruiting Installation - Installation Options page is set to *Company.*

Department Select the department associated with this job opening. This field appears when the Template Segmenting Type field on the Recruiting Installation - Installation Options page is set to *Department.*

Position Select the position number associated with this job opening. This field appears when Position Management Option on the HRMS Options page is set to *Full* or *Partial.*

For continuous and standard requisition job openings, this field is optional.

Job Code Select the job code associated with this job opening. This field appears when Position Management Option on the HRMS Options page is set to *None* or *Partial.*

For continuous job openings, this field is optional.

For standard requisition job openings, this field is required if the Position field is blank. If the Position field contains a value, the system derives the job code from the position number.

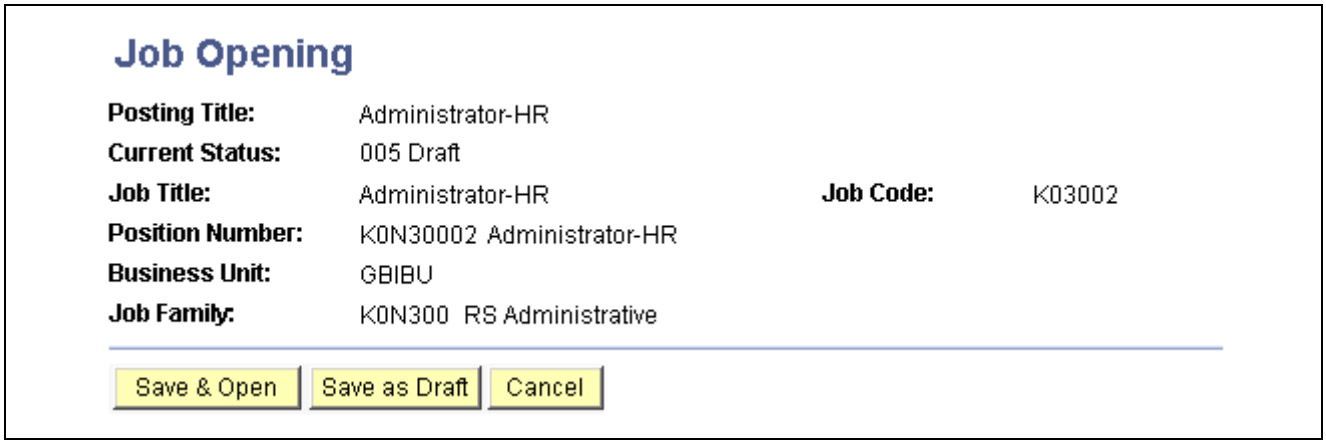
Job Family Select the job family associated with this job opening. This field appears if you selected *Job Family* in the Template Segmenting Type field on the Recruiting Installation - Installation Options page.

Salary Grade Select the salary grade associated with this job opening. This field appears if you selected *Salary Grade* in the Template Segmenting Type field on the Recruiting Installation - Installation Options page.

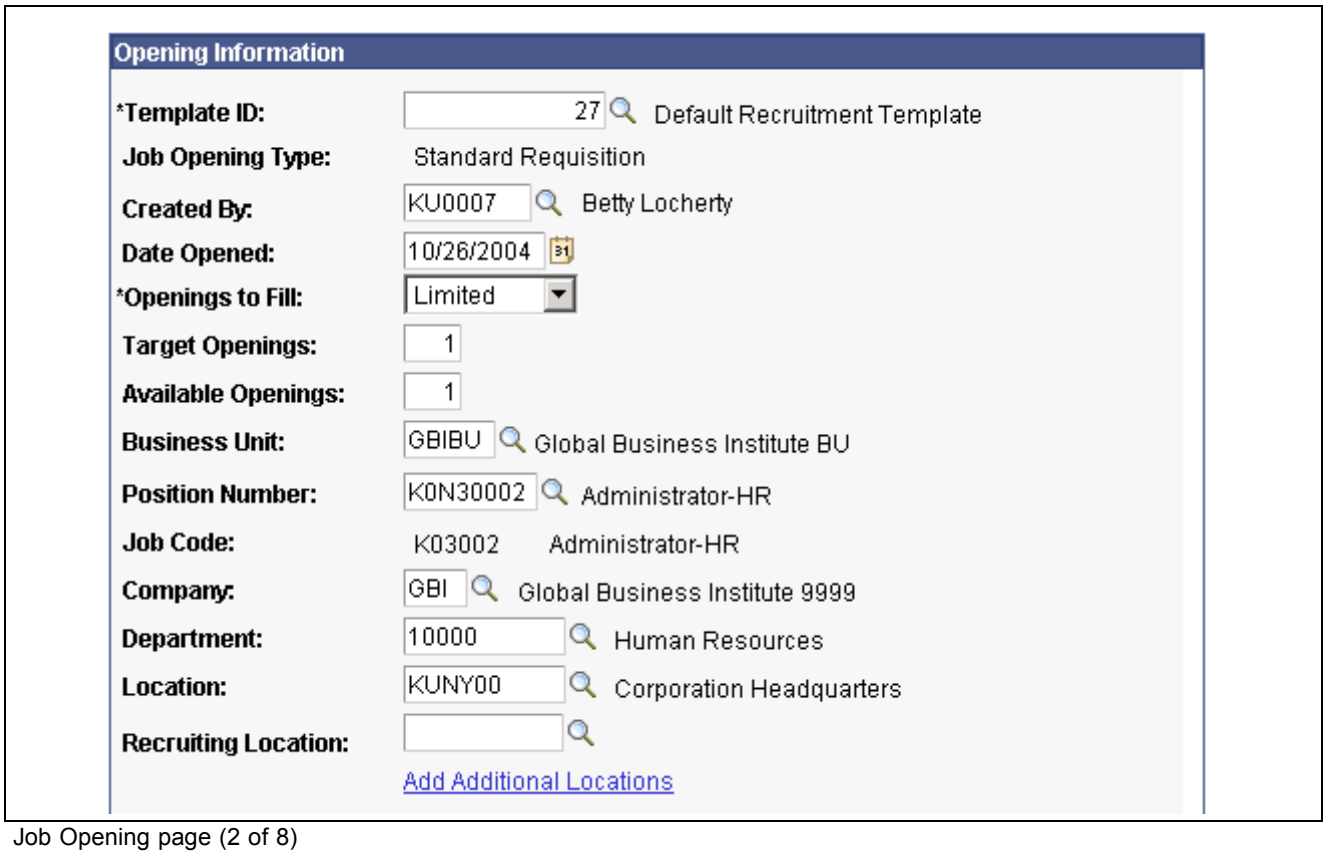
Posting Title Enter the job posting title. For continuous job openings, this field is required if the Position and the Job Code fields are blank. For standard requisitions, this field is optional.

Entering Job Opening Details

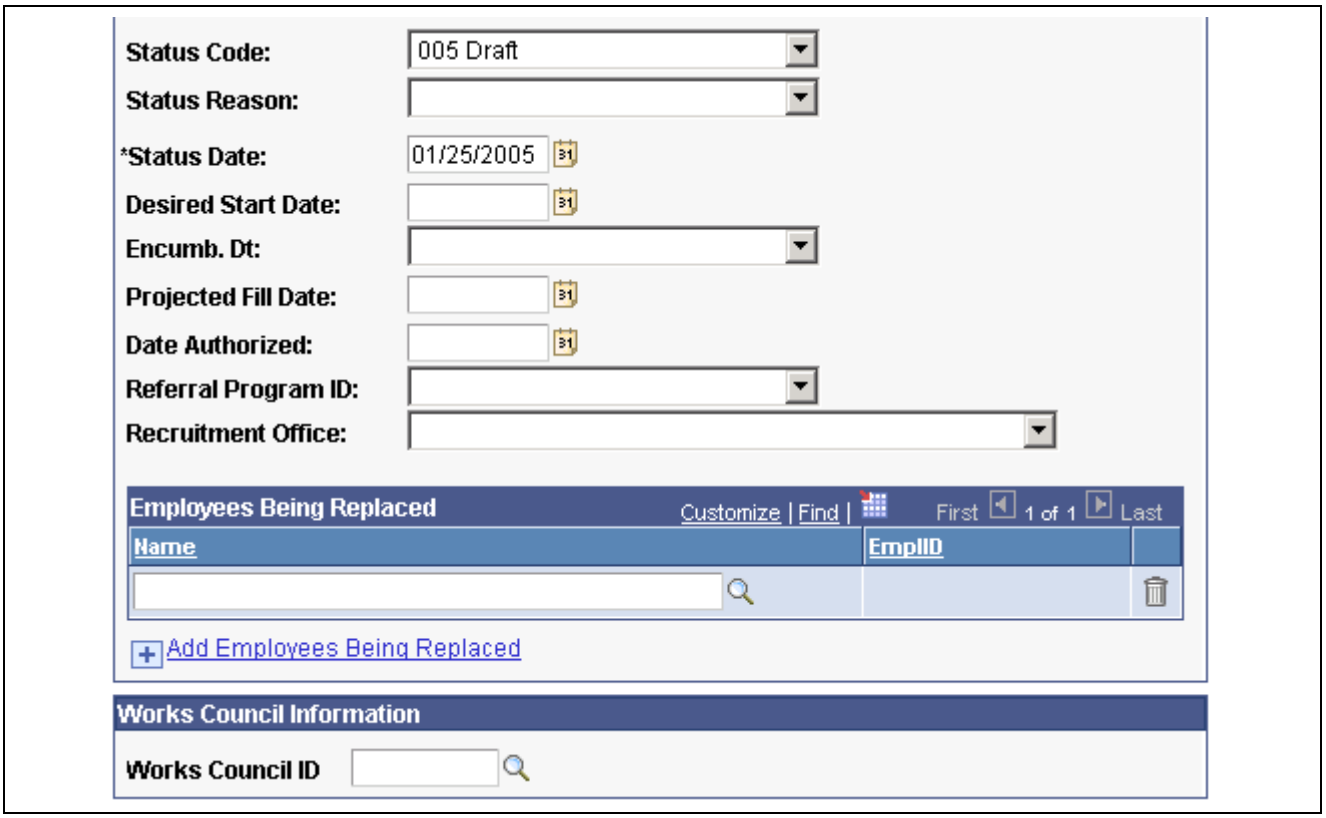
Access the Job Opening page.



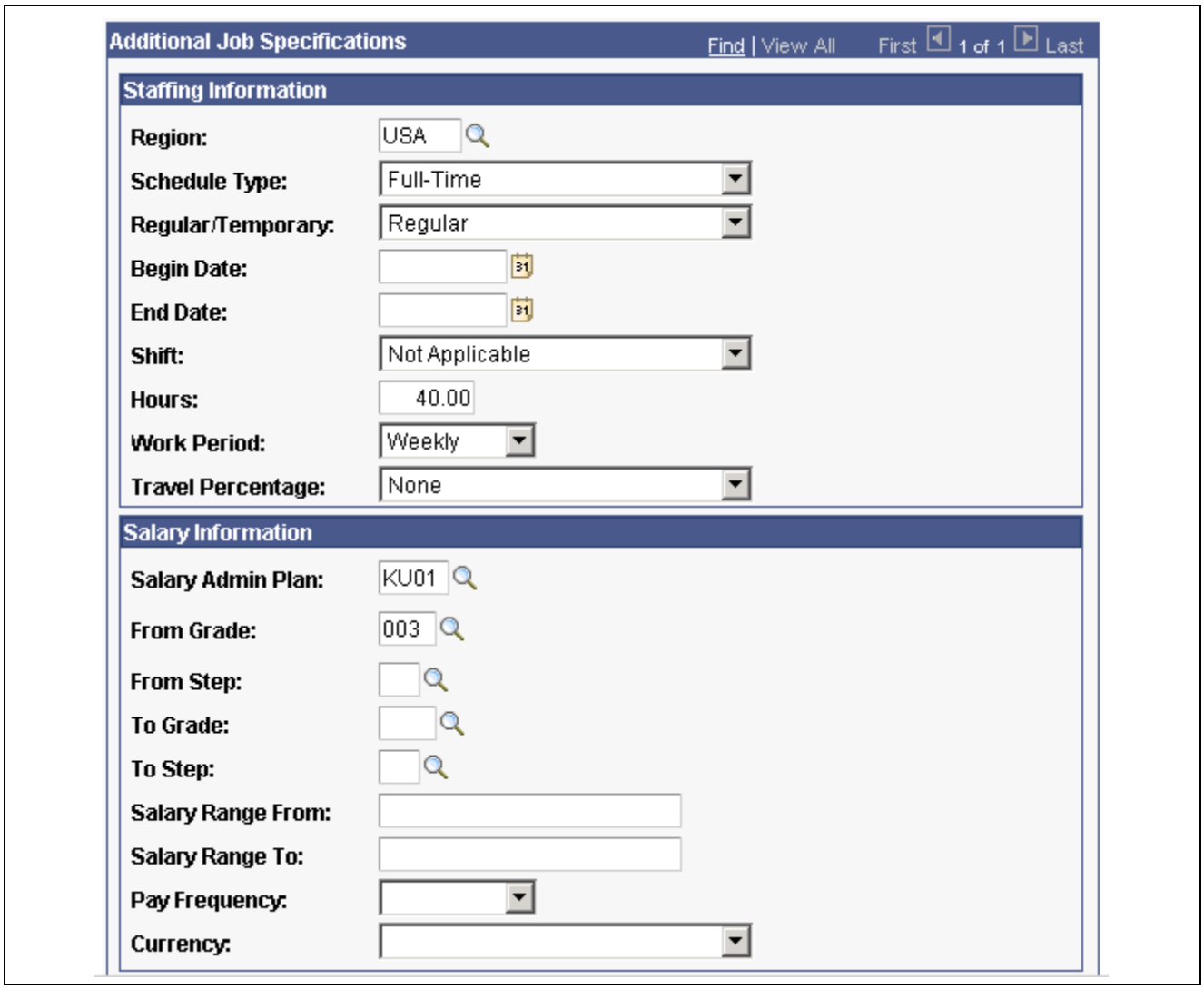
Job Opening page (1 of 8)



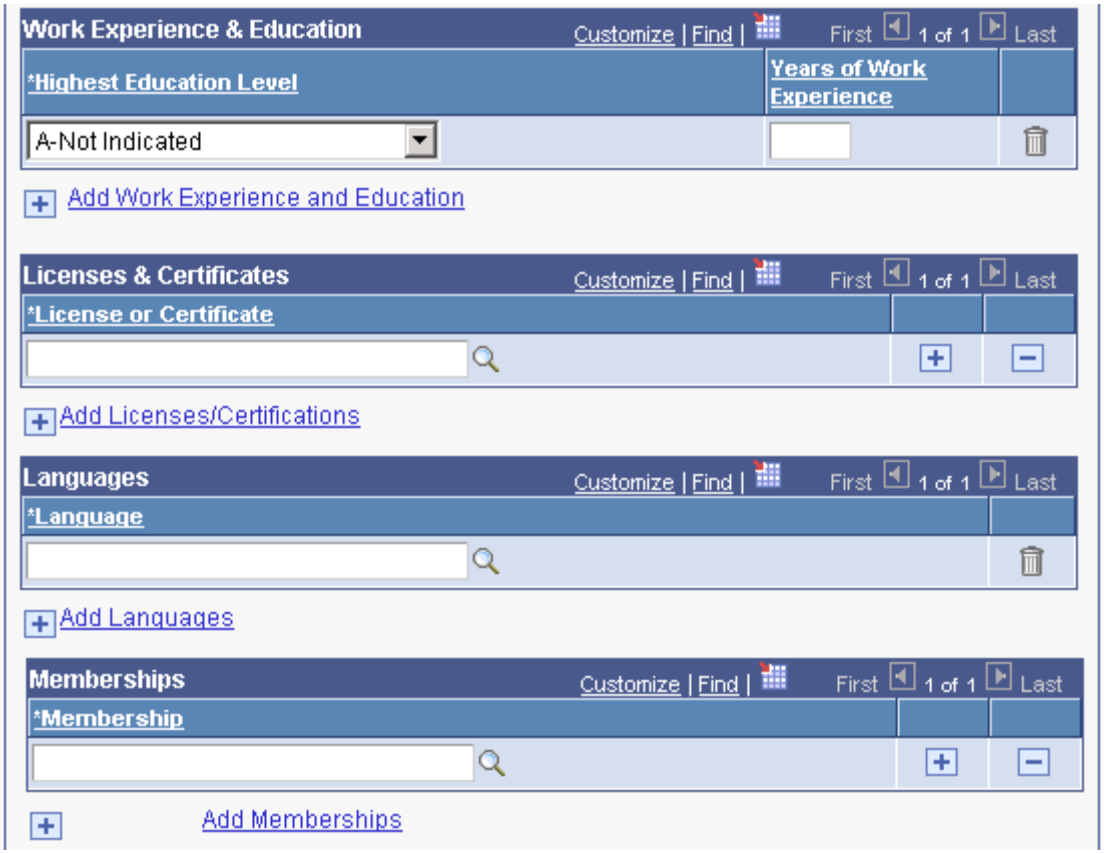
Job Opening page (2 of 8)



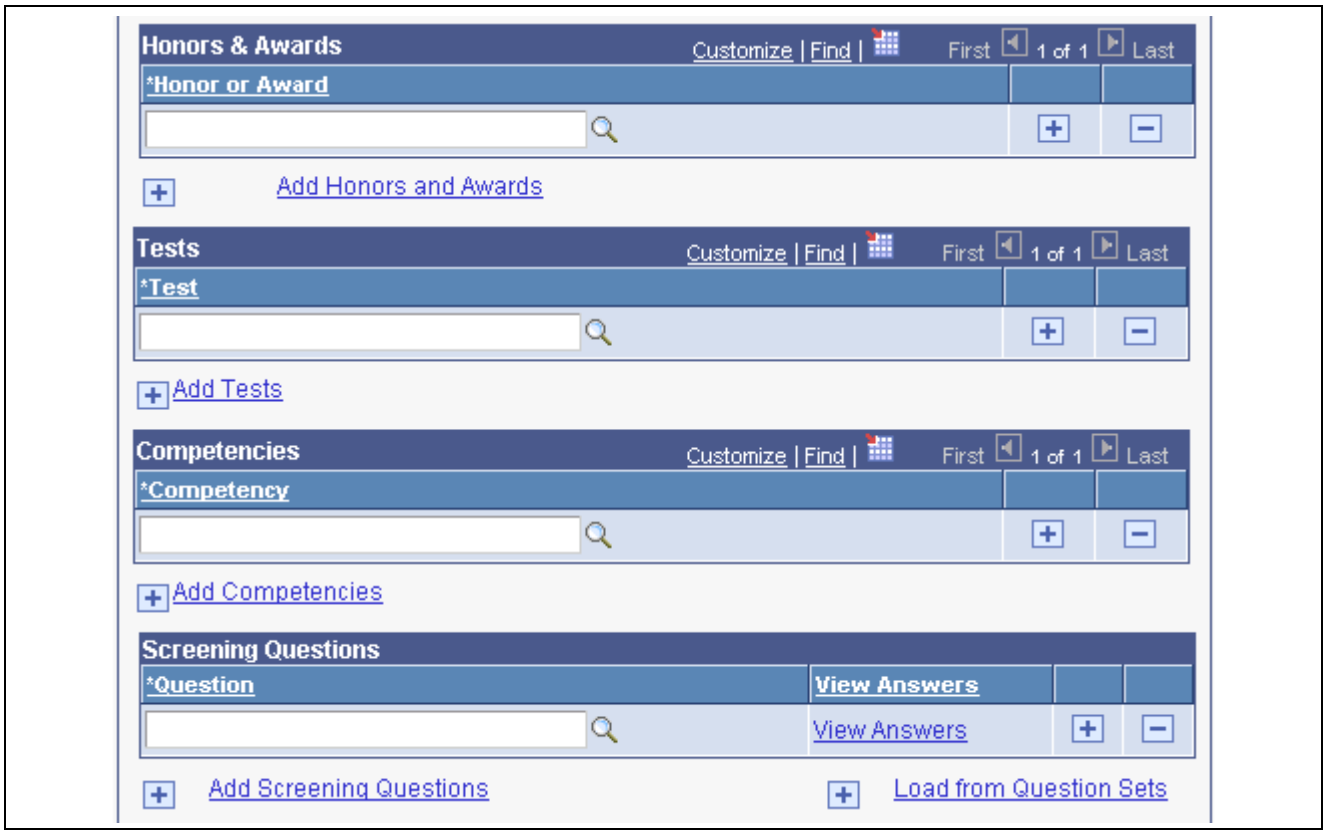
Job Opening page (3 of 8)



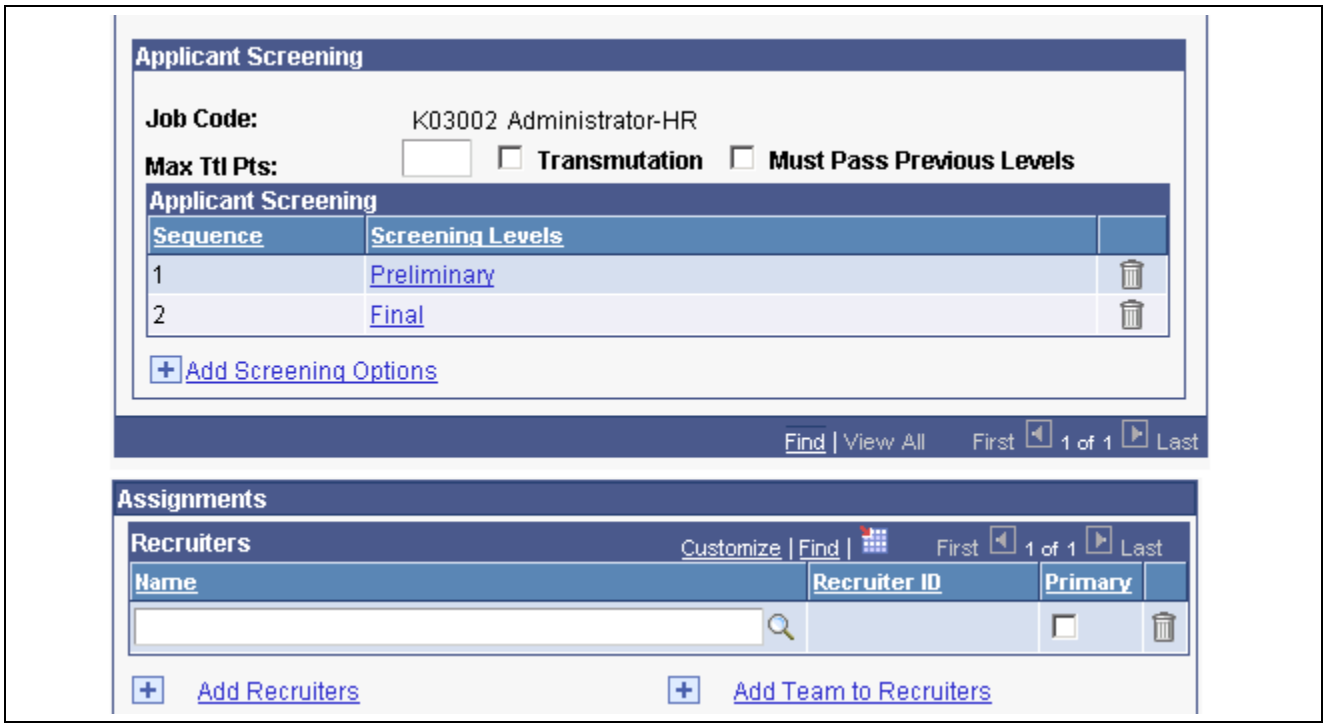
Job Opening page (4 of 8)



Job Opening page (5 of 8)



Job Opening page (6 of 8)



Job Opening page (7 of 8)



Job Opening page (8 of 8)

Note. The availability and order of these sections depends on the template that is associated with the job opening. The system determines which template to use from the segmenting values that are defined on the Recruiting Installation - Installation Options and Recruitment Template - Segmentation Values pages.

Opening Information

Template ID

Select the template that you want associated with this job opening. The system determines the default value for this field based on the Template Segmenting Type entered on the Recruiting Installation - Installation Options page and the Segmentation Values entered on the Recruitment Template - Segmentation Values page.

Only users that have Recruiting row level security enabled can edit this field.

See Chapter 2, "Setting Up the Recruiting Process," Setting Up Talent Acquisition Manager Implementation Defaults, page 6.

See Chapter 3, "Setting Up Recruiting Templates," Assigning Segmentation Values to Recruitment Templates, page 53.

See Chapter 1, "Getting Started with Talent Acquisition Manager," Talent Acquisition Manager Overview, page 1.

Job Opening Type Displays the type of job opening selected on the Enter Primary Job Opening Information page.

Date Opened Enter the date on which the job opening was created. The default date is today's date.

Openings to Fill Specify whether the openings are:

- *Limited:* Enables the Target Openings and Available Openings fields to appear. The system closes the job opening when all openings are filled.
- *Unlimited:* Hides the Target Openings and Available Openings fields and the job opening stays open until it is manually closed.

Target Openings Enter the number of positions that are to be filled. This field appears only if *Limited* was selected in the Openings to Fill field.

Available Openings This field displays the number of available openings only if *Limited* was selected in the Openings to Fill field. The default number of openings is the value entered in the Target Openings field. When you hire an applicant in this job opening, the system decreases this number by one. When all available positions are filled, the status of the job opening is set to *Closed.*

Business Unit Select a business unit. The default value is the value that you entered on the Enter Primary Job Opening Information page.

Position Number Select a position number. This field defaults to the value entered on the Enter Primary Job Opening Information page. This field is available if Allow multiple jobs/positions is not selected on the Recruiting Installation - Installation Options page.

Job Code Select a job code. The default value is the value that you entered on the Enter Primary Job Opening Information page. This field is available if Allow Multiple Jobs/Positions is not selected on the Recruiting Installation - Installation Options page.

Company Select a company. The default value is the value that you entered on the Enter Primary Job Opening Information page when it is the Template Segmenting Type.

Department Select a department. The default value is the value that you entered on the Enter Primary Job Opening Information page when it is the Template Segmenting Type.

Location Select the location code for the location of this job opening.

Recruiting Location Select the recruiting location that you want displayed when a applicant searches for a job opening. For example, the location might say "Headquarters - Building A," but the recruiting location would say "Western Canada."

Add Additional Locations Click to access the Job Opening - Locations page, where you can enter additional locations and recruiting locations.

See Chapter 8, "Creating Job Openings," Adding Locations to Job Openings, page 163.

Status Code Displays the current job opening status. Only recruiting administrators can override this field.

Status Reason Select the appropriate status reason code. The default value is the current status of the job opening.

Status Date Enter the date on which the status went into effect. The default date is the current date.

Desired Started Date Enter the date that the job begins.

This field can be used as a parameter for screening applicants.

Encumb. Dt (encumbrance date) If your organization uses Commitment Accounting for budgeting, indicate how the system budgets for the unfilled position. Select one of these options:

- *Authorization Date:* Start budgeting for the position from the date that it is authorized, as indicated in the Date Authorized field.
- *Project Fill Date:* Start budgeting for the position from the date that you expect to fill the position as indicated in Projected Fill Date field.

If you're not using commitment accounting, leave this field blank.

Projected Fill Date If you selected *Project Fill Date* in the Encumbrance Date Indicator field, enter the date that you expect to fill the job opening.

Date Authorized The date that the job opening was approved. If approvals is being used, this date is the date the job opening reaches final approval.

Referral Program ID Select an employee referral program. If there is an employee referral program associated to the recruitment template, that employee referral program appears here.

Recruitment Office Select a recruitment contact. Recruitment contacts are defined on the Recruitment Contacts page and must have a recruitment type of *Office.*

(USF) Recruitment Type Select from the following available options

Internal: Only current agency employees are considered.

Merit Promotion: Only current and previous federal employees are considered.

Open Competition: All internal and external applicants and federal employees are considered.

This field can be used as a parameter for screening applicants.

(USF) Area of Consideration Select the area that covers the job opening.

- *Agency*
- *External Government*
- *Federal Government*
- *Nationwide*
- *Subagency*
- *Worldwide*

(USF) Draft Status Select the applicant's draft status:

- *Not Applicable*
- *Not Yet Registered*

- *Registered*

This field can be used as a parameter for screening applicants.

(USF) Country Select the country in which the job opening is to be filled.

(USF) Citizenship Status Select the applicant citizenship status. Select from the following options:

- *Alien Permanent*
- *Alien Temporary*
- *Canadian Citizen*
- *Employment Visa*
- *Native*
- *Naturalized*
- *Not Indicated*
- *Other*
- *Permanent Resident*

This field can be used as a parameter for screening applicants.

(USF) Minimum Age Enter the minimum age restriction that might apply to this job opening.

This field can be used as a parameter for screening applicants.

(USF) Maximum Age Enter the maximum age restriction that might apply to this job opening.

This field can be used as a parameter for screening applicants.

(USF) Gender Enter any gender restriction that might apply to this job opening.

This field can be used as a parameter for screening applicants.

(USF) Candidate Name Requests Click to access the Candidate Name Requests page, where you can enter candidates that you highly recommend for the job opening. This information can be used in resolving ties when screening applicants.

(USF) Priority Placement Considerations

Program Select a priority place code that you want to associate with this job opening. The Priority Placement process uses this to identify any applicants that have an entitlement to priority placement consideration.

Add Priority Placement Programs Click to access the Priority Placement page.

Employees Being Replaced

Name If specific employees are being replaced, enter the names here.

Add Employees Being Replaced Click to add another row to the Employees Being Replaced grid.

Works Council Information

Use this group box to select a works council ID. This group box only appears on the page if the Works Council Information section is included on the associated job opening template.

Works Council ID Select a works council ID. Only works council IDs with the same setID as the user appear as values.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Labor Administration*, "Setting Up Works Councils".

Job Code Information

This group box appears only if Allow Multiple Jobs/Positions is selected on the Recruiting Installation - Installation Options page.

Job Code If the job opening has multiple job codes, the system displays the primary job code once the competency is assigned.

When you save the component, the system automatically assigns the competencies to all other job codes in the job opening. When you display the page again, it shows all competencies with every job code in the job opening. However, only the competencies for the primary job code are changeable.

Add Job Codes Click to add another row to the Job Code Information grid.

Delete Job Code Click to delete a job code.

Staffing Information

Region Select the region in which the job opening is located. Regions are defined on the Regulatory Region page.

See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Working with Regulatory Regions".

Schedule Type Select whether this a *Full-time* or *Part-Time* position.

This field can be used as a parameter for screening applicants.

Regular/Temporary Select whether this is a *Regular* or *Temporary* position.

This field can be used as a parameter for screening applicants.

Begin Date Enter the date on which the job is to begin.

End Date Enter the date on which the job is scheduled to end. This field is for temporary job openings.

(USF) Not To Exceed Date If this is a temporary position, enter the date on which it will end.

(USF) Not To Exceed Days If this is a temporary position, enter the maximum number of days after the Not To Exceed Date by which the job can extend.

(USF) Summer Appointment Select if this position is a summer appointment. This information is sent as part of the vacancy information for the USA Jobs program. When there are multiple job codes, the primary job code value for summer appointment is used.

Shift Select the shift for this job opening.

This field can be used as a parameter for screening applicants.

Hours Enter the default number of hours in a normal workweek for this job. The field defaults to the number associated with the job code.

This field can be used as a parameter for screening applicants.

Work Period Select the time period in which employees must complete the standard hours. These values are created by using the Frequency table.

Travel Percentage Enter the percent of travel required by this job.

This field can be used as a parameter for screening applicants.

(USF) Supervisor Level Enter the supervisor level. The default value is the level assigned on the job code.

(USF) FLSA Status (fair labor standards act status) Displays the FLSA status associated with the job code.

(USF) LEO/Fire Position (law enforcement officer/fire position) Displays the LEO/Fire position code associated with the job code.

(USF) Sensitivity Code Select a sensitivity code. The default value is the value assigned to the job code.

(USF) Type of Appointment Select the type of administrative post.

Salary Information

Salary Admin Plan Displays the salary plan associated with the position. You can change the salary plan by selecting another from the list of available options.

(USF) Pay Plan Displays the pay plan associated with the position. You can change the pay plan by selecting another from the list of available options.

From Grade Displays the low grade associated with the position. You can change the from grade by selecting another from the list of available options

From Step Displays the low step associated with the position. You can change the from step by selecting another from the list of available options

To Grade Displays the high grade associated with the position. You can change the to grade by selecting another from the list of available options

To Step Displays the high step associated with the position. You can change the to step by selecting another from the list of available options

Salary Range From The system supplies the salary range from the Job Code table. You can override these values.

Salary Range To The system supplies the salary range from the Job Code table. You can override these values.

Pay Frequency Select the pay frequency in which this job is paid.

Currency Select the currency in which this job is paid.

(USF) Occupational Series Displays the occupational series that is associated with this occupational series for this position.

(USF) PATCOB Code Displays the PATCOB code that is associated with occupational series for this position.

Work Experience & Education

Highest Education Level Select the highest level of education that an applicant must have completed to be eligible for this job. Education levels are defined on the Education Level Achieved Table page.

This field can be used as a parameter for screening applicants.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies*, "Setting Up Competencies and Accomplishments," Setting Up Educational Qualifications and Accomplishments.

Years of Work Experience Enter the years of work experience required for this job opening.

Add Work Experience & Education Click to add another row to the Work Experience & Education grid.

Licenses & Certificates

License or Certificates Select a license or certificate required by this job opening. Licenses and certificates are defined on the Licenses/Certifications Table page.

This field can be used as a parameter for screening applicants.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies*, "Setting Up Competencies and Accomplishments," Setting Up Educational Qualifications and Accomplishments.

Add Licenses/Certificates Click to add another row to the Licenses & Certificates grid.

Languages

Language Select a language required by this job opening. Languages are defined on the Language Table page.

This field can be used as a parameter for screening applicants.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies*, "Setting Up Competencies and Accomplishments," Setting Up Educational Qualifications and Accomplishments.

Add Languages Click to add another row to the Languages grid.

Memberships

Membership Select a membership required by this job opening. Memberships are defined on the Membership Table page.

This field can be used as a parameter for screening applicants.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies*, “Setting Up Competencies and Accomplishments,” Setting Up Educational Qualifications and Accomplishments.

Add Memberships Click to add another row to the Memberships grid.

Honors & Awards

Honor or Award Select an honor or award required by this job opening. Honors and awards are defined on the Honor/Award Table page.

This field can be used as a parameter for screening applicants.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies*, “Setting Up Competencies and Accomplishments,” Setting Up Educational Qualifications and Accomplishments.

Add Honors and Awards Click to add another row to the Honors & Awards grid.

Tests

Test Select a test required by this job opening. Tests are defined on the Test table.

This field can be used as a parameter for screening applicants.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies*, “Setting Up Competencies and Accomplishments,” Setting Up Educational Qualifications and Accomplishments.

Add Tests Click to add another row to the Tests grid.

Competencies

Competency Select a competency required by this job opening. Competencies are defined on the Competency Table page. The system supplies the default competencies associated with the job code.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies*, “Setting Up Competencies and Accomplishments,” Setting Up Competencies.

Add Competencies Click to add another row to the Competencies grid.

Screening Questions

Description Select a screening question. Screening questions are defined on the Question Definition page.

Screening questions are associated to a job opening, so that when an applicant applies to the job, the questions appear to the applicant during the Apply online process. It is optional to associate them to screening criteria.

See Chapter 2, “Setting Up the Recruiting Process,” Setting Up Applicant Screening, page 25.

Add Screening Questions Click to add another row to the Screening Questions grid.

Applicant Screening

Max Ttl Pts (maximum total points) — Enter the total points an applicant can achieve during screening.

(USF) Transmutation — Select if you want to use transmutation. If screening levels are defined to allow applicants to get more than 100 points, you can transmute the applicant score, which bases the scoring on a scale of 100.

Must Pass Previous Levels — Select if the applicant must pass the current screening level to move on to the next level.

(USF) Federal Group Box

Raw Augmented Score Limit — Total number of points enabled for augmentation. The recruiting specialist may award augmentation points for certain competencies or accomplishments that are not required for the position but may be given consideration in the selection process.

Raw Veterans Pref Score Limit raw veterans preference score limit — Total number of points enabled for veterans preference. The recruiting specialist may award veteran preference points for certain competencies or accomplishments that are not required for the position but may be given consideration in the selection process.

Tie Break Number — Enter the agency's random number that is used to find the starting point for the number sequence used to break ties on a certain day.

(USF) Competitive

Rank Candidates of Category 1 — Select to indicate that when full ranking process is used the applicants on the list of eligible candidates are ranked according to category 1. Category 1 ranking is Qualified/Well-Qualified/Best_Qualified Preference Eligibles with 'Must Select' for the given Recruiting Type.

Rank Candidates of Category 2 — Select to indicate that when full ranking process is used the applicants on the list of eligible candidates are ranked according to category 2. Category 2 ranking is Well-Qualified/Best_Qualified Preference Eligibles with 'Must Consider' for the given Recruiting Type.

Rank Candidates of Category 3 — Select to indicate that when full ranking process is used the applicants on the list of eligible candidates are ranked according to category 3. Category 3 ranking is Best_Qualified Non-Preference Eligibles or Best_Qualified Preference Eligibles with an effect of 'None' for the given Recruiting Type.

Rank Candidates of Category 4 — Select to indicate that when full ranking process is used the applicants on the list of eligible candidates are ranked according to category 4. Category 4 ranking is Qualified/Well-Qualified Non-Preference Eligibles or Qualified/Well-Qualified Preference Eligibles with an effect of 'None' for the given Recruiting Type.

Veteran Preferred in Tie Break — Select to allow veterans preference be used as a tie breaking criteria.

(USF) Noncompetitive

Rank Candidates of Category 1 Select to indicate that when full ranking process is used the applicants on the list of eligible candidates are ranked according to category 1. Category 1 ranking is Qualified/Well-Qualified/Best_Qualified Preference Eligibles with ’Must Select’ for the given Recruiting Type.

Rank Candidates of Category 2 Select to indicate that when full ranking process is used the applicants on the list of eligible candidates are ranked according to category 2. Category 2 ranking is Well-Qualified/Best_Qualified Preference Eligibles with ’Must Consider’ for the given Recruiting Type.

Rank Candidates of Category 3 Select to indicate that when full ranking process is used the applicants on the list of eligible candidates are ranked according to category 3. Category 3 ranking is Best_Qualified Non-Preference Eligibles or Best_Qualified Preference Eligibles with an effect of ’None’ for the given Recruiting Type.

Rank Candidates of Category 4 Select to indicate that when full ranking process is used the applicants on the list of eligible candidates are ranked according to category 4. Category 4 ranking is Qualified/Well-Qualified Non-Preference Eligibles or Qualified/Well-Qualified Preference Eligibles with an effect of ’None’ for the given Recruiting Type.

Veteran Preferred in Tie Break Select to allow veterans preference be used as a tie breaking criteria.

Applicant Screening

The fields in this group box default to values that you entered on the screening template that is associated with recruitment template assigned to this job opening.

Sequence Displays the screening sequence number from the defaulted template.

If you are adding a screening level, enter the order in which you want the screening levels executed.

Screening Levels Displays the screening level title from the defaulted template. Click the screening level name link to access the Job Opening - Job Opening Screening Criteria page, where you can define the screening criteria.

See Chapter 2, “Setting Up the Recruiting Process,” Setting Up Applicant Screening, page 25.

Add Screening Options Click to add another row to the Applicant Screening grid.

Recruiters

Name Select a recruiter or recruiting team for this job opening. The system uses this person or persons as the second approver of the job opening, if job opening approvals is selected on the Recruiting Installation - Installation Options page. The system also uses recruiters and teams to specify access rights to a job opening.

Add Recruiters Click to add another row to the Recruiters grid.

Add Team to Recruiters Click to add another row to the Recruiters grid.

Hiring Managers

Name Select a hiring manager or hiring manager team for this job opening. If the approval process is active, the system uses this information to determine who is the first approver for this job opening. The system also uses managers and teams to specify access rights to a job opening.

Add Hiring Managers Click to add another row to the Hiring Managers grid.

Add Team to Hiring Managers Click to add another row to the Hiring Managers grid.

Interviewers

Name Select interviewers or interview teams. The system uses this list of interviewers as the default list when you schedule interviews for the job opening.

Add Interviewers Click to add another row to the Interviewers grid.

Add Team to Interviewers Click to add another row to the Interviewers grid.

Interested Party

Name Select the name of the person you want to be associated with this job opening.

Add Interested Parties Click to add another row to the Interested Party grid.

Add Team to Interested Parties Click to add another row to the Interested Party grid.

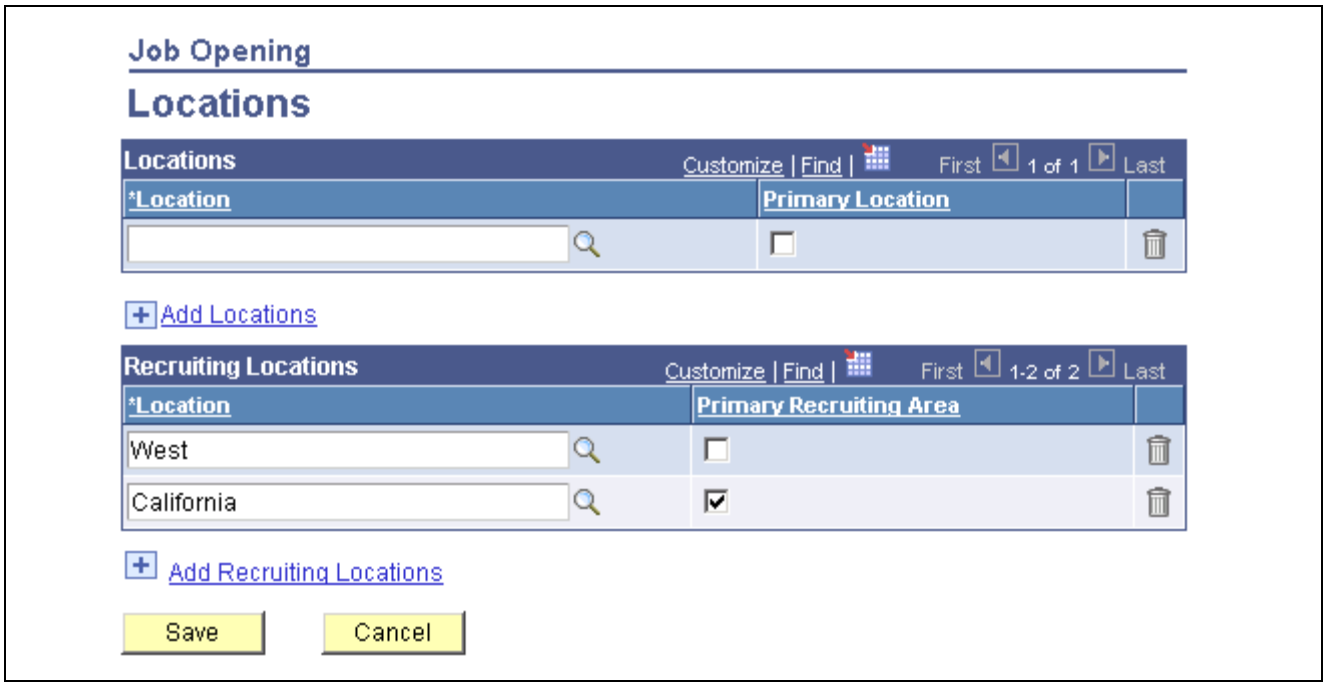
Postings

Posting Title Enter the title that you want to display when the applicant searches for a job posting.

Add Postings Click to add another row to the Postings grid.

Adding Locations to Job Openings

Access the Job Opening - Locations page.



Job Opening - Locations page

Locations

Location Select an HR location that identifies where the job opening is physically located.

Primary Location If there is more the one location associated with the job opening, indicate which location is primary.

Add Locations Click to add another row to the Locations grid.

Recruiting Locations

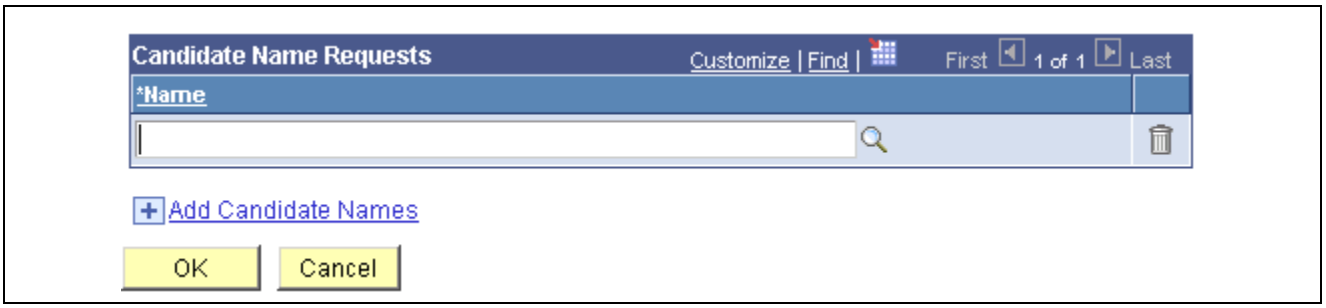
Location Select the recruiting location that appear to applicants when they search for a job.

Primary Recruiting Area If there is more the one recruiting location associated with the job opening, indicate which recruiting location is primary.

Add Recruiting Locations Click to add another row to the Recruiting Locations grid.

(USF) Entering Candidate Name Requests

Access the Candidate Name Requests page.

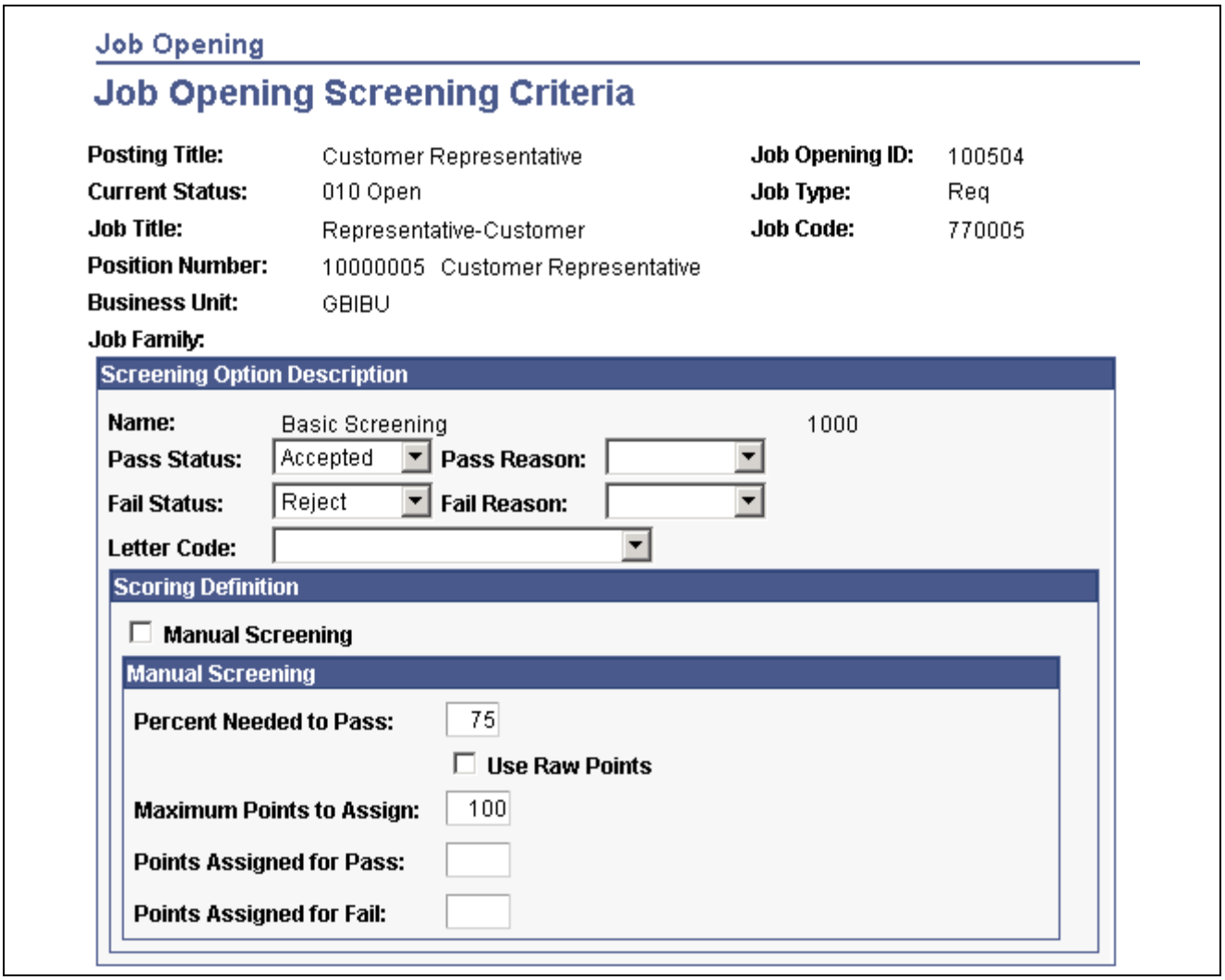


Candidate Name Requests page

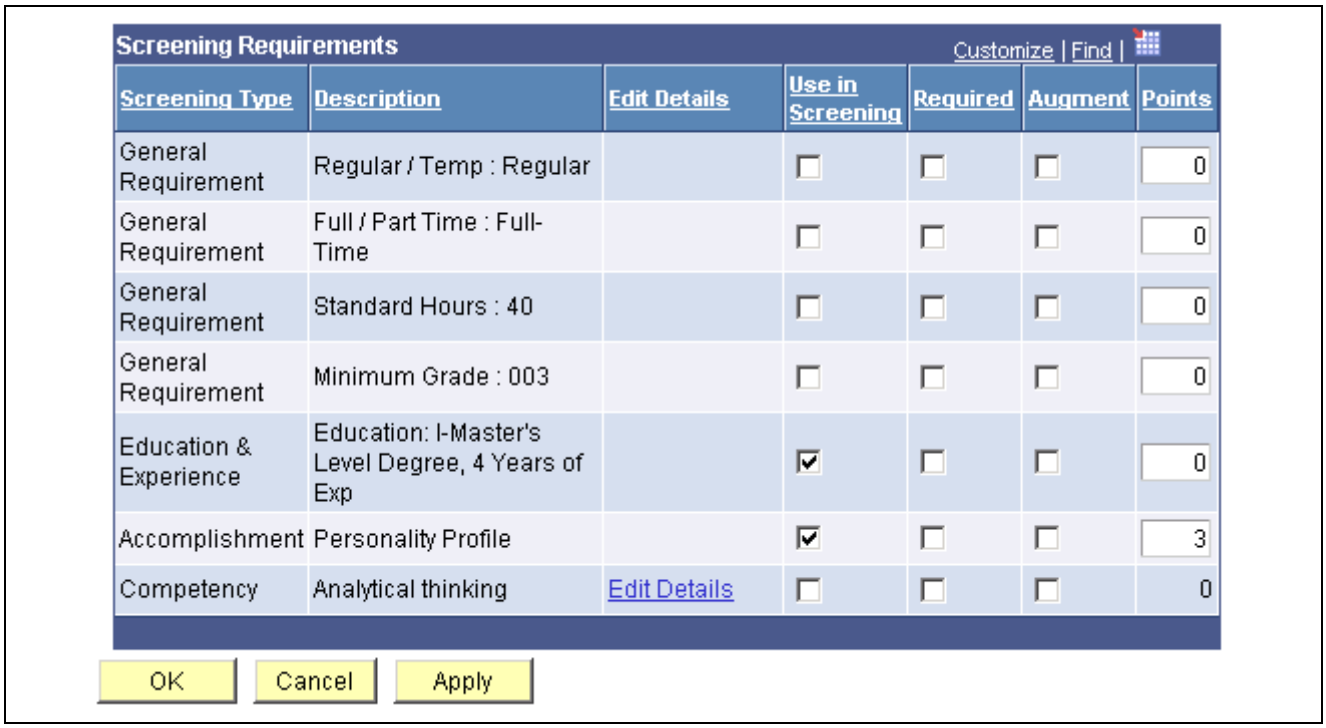
Name Select the name of a person who you would like to target for this position. This field can be used as a tie breaker in screening.

Adding Screening Criteria to Screening Levels

Access the Job Opening - Job Opening Screening Criteria page.



Job Opening - Job Opening Screening Criteria page (1 of 2)



Job Opening - Job Opening Screening Criteria page (2 of 2)

Screening Option Description

Name Displays the name of the screening level.

Pass Status Select the status that you want assigned to the applicant when they pass a screening level. .

Pass Reason Select the reason that you want assigned to the applicant when they pass a screening level.

Fail Status Select the status that you want assigned to the applicant when they fail a screening level.

Fail Reason Select the reason that you want assigned to the applicant when they fail a screening level.

Letter Code Select the letter that you want sent to the applicant if they fail the screening level.

Scoring Definition

Manual Screening Select if you do not want the screening level to assign points, but plan to use manually assign screening points. When you select this option, the system disables all fields in the Manual Screening group box.

Manual Screening

Percent Needed to Pass Defines the minimum score, expressed as a percentage, that each applicant must to get in order to pass the screening level. This value can be populated based on the screening level definition on the screening template.

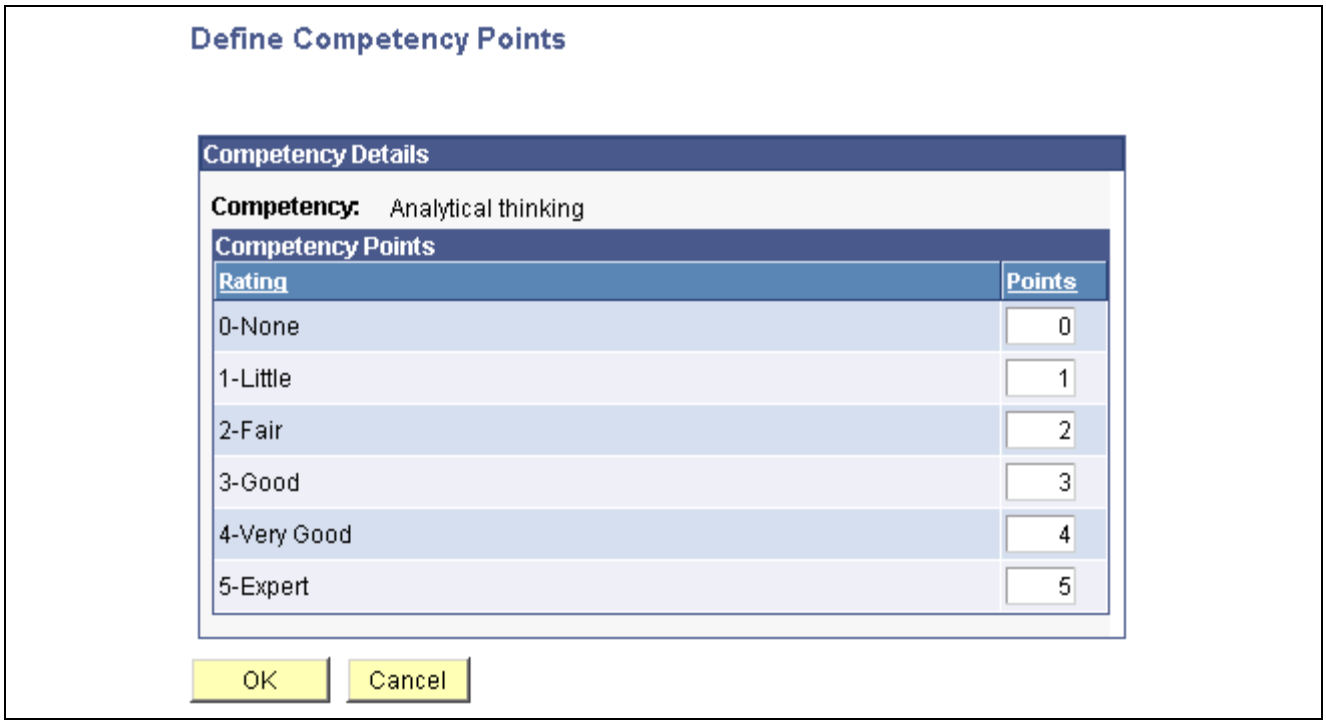
Use Raw Points	Select if the accumulated points for an applicant will be used to determine whether they pass a screening level. If this is selected, do not specify a maximum amount of points to assign.
Maximum Points to Assign	Define the maximum points that can be earned by an applicant for that screening level.
Points Assigned for Pass	Define the number of points that should be given to an applicant for passing that screening level. It overrides any points accumulated from passing screening requirements.
Points Assigned for Fail	Define the number of points that should be given to an applicant for failing that screening level. It overrides any points accumulated from passing screening requirements. This value can be assigned a negative value, to deduct points from an applicant's score if they should fail that screening level.

Screening Requirements

Description	Displays the job requirements specified in the job opening details.
Edit Details	Click to access the Define Competency Points page. where you can change the points associated with the competency.
Used in Screening	Select to use this criteria in the screening level.
Required	Select if the applicant must have this criteria to pass the screening level.
Augment	Select to assign extra-credit points to the applicant when they meet this criteria. These points appear on the Screening Details page for an applicant for each screening level.
Points	Enter the number of points the applicant receives if they meet the requirement. These points appear on the Screening Details page for an applicant for each screening level and are separate from augmenting points.

Defining Competency Points

Access the Define Competency Points page.

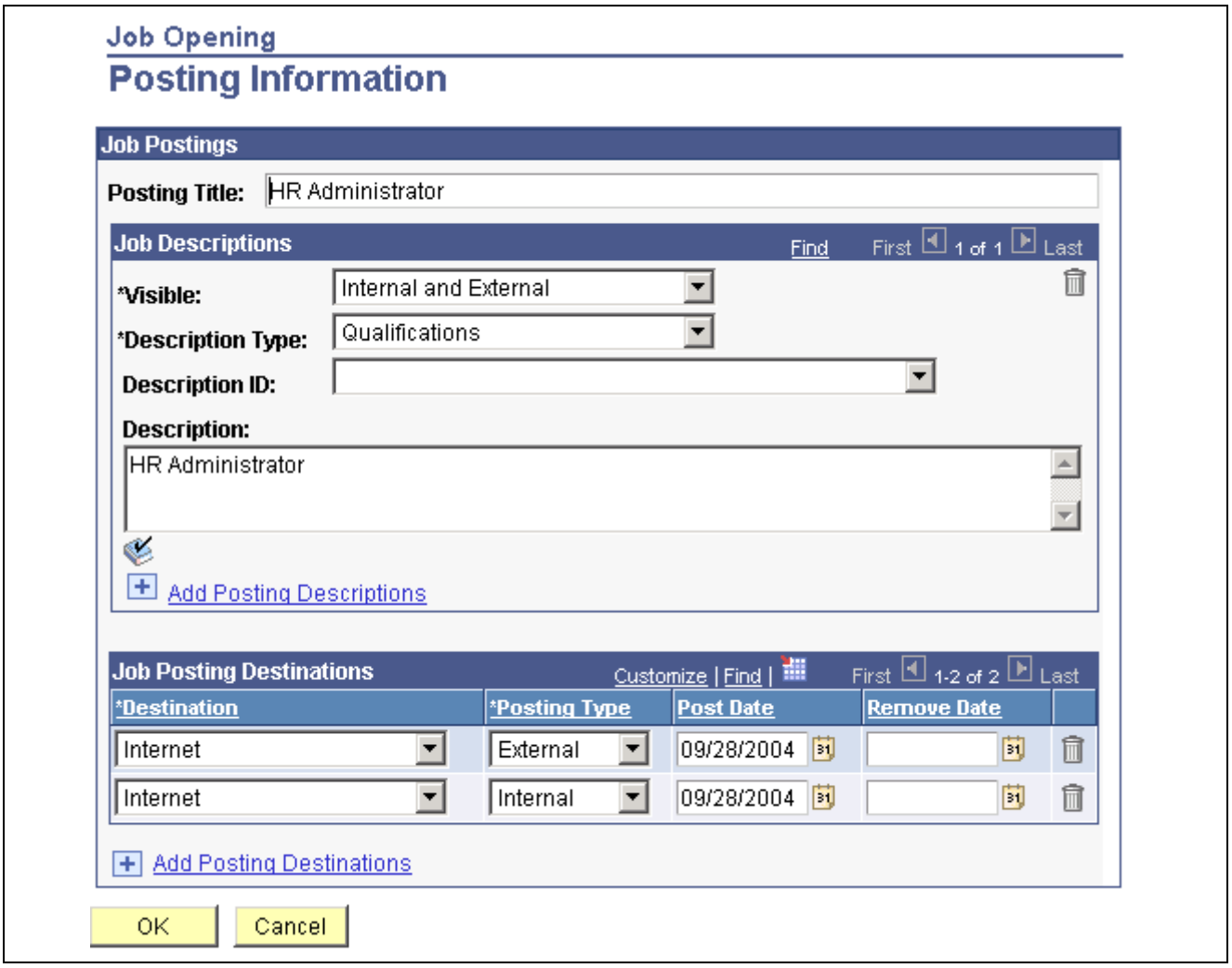


Define Competency Points page

For each rating enter the points that you want assigned to an applicant if they meet that screening criteria.

Adding Job Posting Details

Access the Job Opening - Posting Information page.



Job Opening - Posting Information page

Job Postings

Posting Title Displays the title entered on the Job Opening page, but can be modified.

Job Descriptions

Visible Specify whether this posting description is visible to *Internal, External,* or *Internal and External* applicants.

Description Type Select a description type. Description types are defined on the Posting Description Types page.

Description ID Select a description from the Posting Description Library page. The system automatically populates the Description field with the text from the library posting.

Description Enter a description for this description type.

Add Posting Descriptions Click to add another row to the Job Descriptions.

See Chapter 2, "Setting Up the Recruiting Process," Setting Up Job Postings, page 13.

Job Posting Destinations

Destinations Select where you want this posting to go. Valid options are active Marketing type recruitment sources.

See Chapter 5, "Setting Up Third Party Integrations," Setting Up Recruitment Sources, page 97.

Posting Type Select the type of posting. Options are:

- *Contingent*
- *External*
- *Internal*
- *Office*
- *Recruitment*

Post Date Enter the date on which you want the job posting posted to this destination. You can enter a future date.

Remove Date Enter the date on which you want to remove the posting from this destination.

Creating Job Openings from Open Positions

This section provides an overview of job opening creation from open positions and discusses how to create job openings from open positions.

Understanding Job Opening Creation from Open Positions

To create job openings from open positions, run the Create Job from Position Application Engine process (HRS_CRJOB).

During the Create Job from Position process, the system:

1. Determines all current open positions in the company.

   To determine whether a position is open, the system uses the PS_POSN_VACANT view on the Position Data table (PS_POSITION_DATA).

2. Identifies the maximum head count allowed for each open position.
3. Determines the current head count for each open position (how many incumbents, or current employees, fill any or all of the head count).
4. Creates one standard requisition job opening for each position number that has openings and sets the status of each new job opening to Draft.

   When the system creates a new job opening, it populates the job opening data with data from the position or the derived job code—for example, the business unit, job code, company, department, location, and staffing and salary information. The system also populates the Target Openings field on the Job Opening page with the number of openings (maximum head count minus current head count) for that position number.

   If you select the Allow Duplicates option on the Create Job Openings from Positions page, the system creates a job opening for all open positions, regardless of whether a job opening for a position already exists.

If you clear the Allow Duplicates option on the Create Job Openings from Positions page, the system checks to see if a job opening already exists for each position number. If a job opening already exists for a position number, the system creates a new job opening only if the number of open positions (maximum head count minus current head count) is greater than the number of target openings on the Job Opening page for the existing job opening. For example, if a position has five openings and a job opening already exists for that position with a target opening value of two, the system creates one new job opening with three as the target opening value.

The system uses the segmenting type that is specified in the Template Segmenting Type field on the Recruiting Installation - Installation Options page and position data to select a recruitment template for each job opening. Because position data might be different for each position, the system could potentially use a different recruitment template for each job opening that it creates.

When you run the process, you must specify an originator. The originator appears in the Created By field on the Job Opening page, and will have access to the job openings after the system creates them. After the process completes, the originator will be able to access the new job openings through existing recruiting components, complete the necessary data entry—for example, screening, posting, and approval information—and submit the job opening for approval or save as normal, depending on whether the system requires approval for standard requisitions job openings.

Note. This feature is available only to organizations that use partial or full position management.

The user must also have the HCCPRS0000 permission list to access this page.

See Appendix B, "Delivered Permission Lists and Roles for Talent Acquisition Manager," page 433.

Pages Used to Create Job Openings from Open Positions

Page Name	Object Name	Navigation	Usage
Create Job Openings from Positions	HRS_RUN_CR_JOB	Recruiting, Administration, Create Openings from Positions, Create Job Openings from Positions	Create job openings from open positions.

Creating Job Openings from Open Positions

Access the Create Job Openings from Positions page.



Create Job Openings from Positions page

Allow Duplicates Select to have the system create job openings for all position openings, regardless of whether a job opening already exists for a position. Clear

this option if you do not want the system to create duplicate job openings. By default, this option is cleared.

Originator Select the ID of the person that you want to be the originator of the new job openings. The originator appears in the Created By field on the Job Opening page, and will have access to the job openings after the system creates them. By default, the system populates this field with the current user's ID.

Click Run to run this request. PeopleSoft Process Scheduler runs the Create Job from Position process at user-defined intervals.

See Also

PeopleTools 8.45 PeopleBook: Using PeopleSoft Applications

Cloning Job Openings

This section provides an overview of cloning job openings and discusses how to clone a job opening.

Understanding Cloning Job Openings

Another way to create a job opening is to clone an existing one. To clone a job opening, use the Clone Job Opening (HRS_JO_360) component. The only time you cannot clone an existing job opening is when the status of the job opening is *Draft.*

When you clone a job opening most of the data is copied from the existing job opening to the new one. However, some data will be left blank or adjusted. The following table summarizes the data that is transferred from the existing job opening to new job opening.

Existing job opening	New job opening
Status.	*Open* if approvals is not selected on the Installation table. *Pending Approval* if approvals are associated with the job opening.
Status Reason.	*New Authorization*
Open Date.	Current Date
Status Date.	Current Date
Desired Start Date/Projected Fill Date.	Set according to the dates in the Open Date field. The system uses the interval between the open date and the desired start date or projected fill date to determine the dates for the cloned job opening.
All other dates.	Blank
Applicant and interview schedule data linked to the copied job opening.	Not copied.

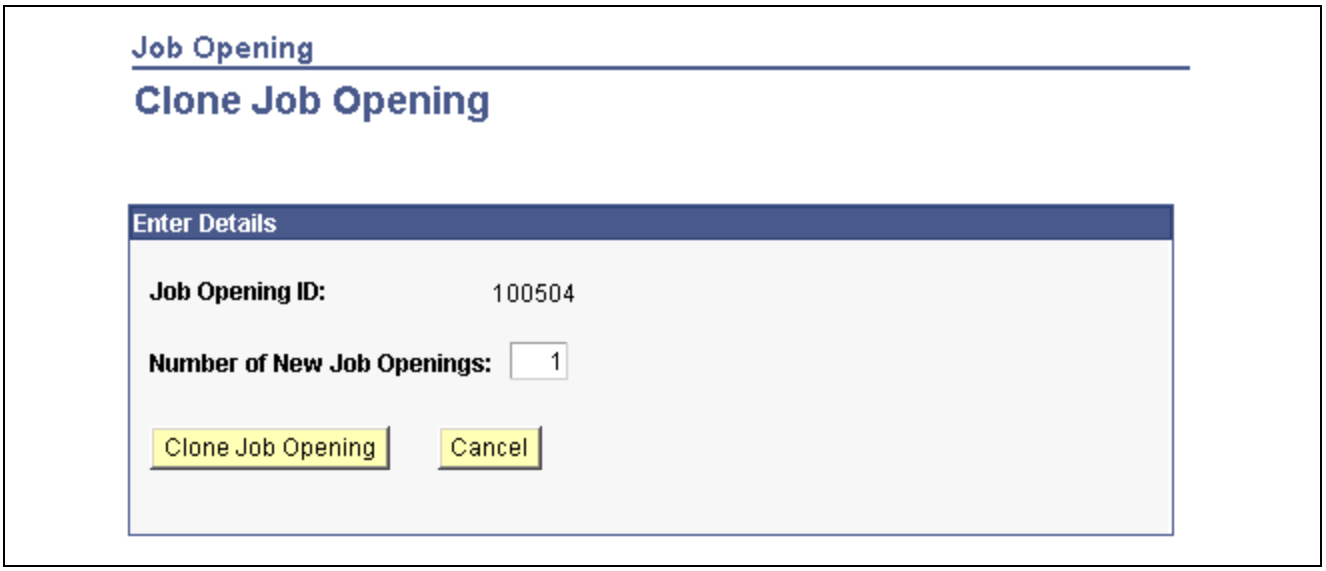
Existing job opening	New job opening
Approval process, if exists.	Copied
Primary Recruiter/Hiring Manager Teams.	Active teams copied
Additional recruiters, hiring managers, and teams.	Active teams copied.

Pages Used to Clone Job Openings

Page Name	Object Name	Navigation	Usage
Find Job Openings	HRS_JO_FIND_JOB	Recruiting, Find Job Openings, Find Job Openings	Search for and select job openings.
Job Opening	HRS_JO_360	Click a job name link on the Find Job Openings page.	Perform various tasks related to job openings.
Job Opening - Clone Job Opening	HRS_JO_CLONE_SEC	Click the Clone Job Opening icon or the Clone link on the Job Opening page.	Clone a job opening.

Cloning a Job Opening

Access the Job Opening - Clone Job Opening page.



Job Opening - Clone Job Opening page

Job Opening ID Displays the job opening ID for the job opening that you want to clone.

Number of New Job Openings Enter the number of job openings that you want to create.

Clone Job Opening Click to clone the job opening. The system displays a confirmation message.

Approving Job Openings

This section provides an overview of job opening approvals and discusses how to:

- View pending approvals.
- Approve a job opening.
- Add another approver or reviewer.

Understanding Job Opening Approvals

PeopleSoft software delivers a two-step approval process for job openings. You can modify the approval process to fit your organization's business needs.

See Chapter 6, "Working with Approvals," page 115.

To use the approval process for job openings, you must select the Standard Requisition and Continuous Job Opening check boxes in the Approvals Required group box on the Recruiting Installation - Installation Options page. When a recruiter creates and submits a job opening, the system checks whether approvals is required for that job opening type. If the check box is selected for the type of job opening that is being created, the system initiates the approval process. For example, if a recruiter creates a standard requisition job opening, and Standard Requisition is selected on the Recruiting Installation - Installation Options page, the system initiates the approval process.

Each approver can take action on the request on the Job Opening - Approval page, which they can access by using the link in the email notification that they receive or through the Pending Approvals component. Approvers can also add additional approvers or reviewers to an individual job offer by clicking on the Insert Approver icon on the Manage Applicants - Disposition Details page and entering information for the additional approver or reviewer on the Insert additional approver or reviewer page.

Approvers have the option of either:

- Approving the job offer.
- Denying the job offer.

  The system sets the job offer status to Denied, stops the progress of the job offer, and notifies the hiring manager. However, the originator of the job opening can later resubmit the job opening.
- Pushing back the job offer.

  The system notifies the previous approver that the job offer has been pushed back and needs his or her attention.

Note. The first approver cannot push back the job offer.

The first approver is the supervisor of the person or persons entered as the primary hiring manager on the Job Opening page. To identify the supervisor, the system uses the Target Information page. The second approver is the recruiter or recruiters entered as the recruiter for the job opening.

This is how the delivered two-step job opening approval process works:

1. A recruiter, also known as the originator, creates a job opening and submits it.

   The system sets the job opening status to Pending Approval. The system also identifies the first and second approvers and displays the Job Opening - Approval page that summarizes who is in the two-step approval process.

2. The system notifies the first approver.

   The first approver is the supervisor of the person entered as the primary hiring manager on the Job Opening page. If there is more than one hiring manager and none is marked as primary, or if there is no hiring manager, then the first approval step is skipped. To identify the supervisor of the hiring manager, the system uses the Target Information page.

   See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up and Working with Self-Service Transactions," Setting Up Access to Direct Reports Data.

3. If the first approver approves the job offer, the system notifies the second approver.

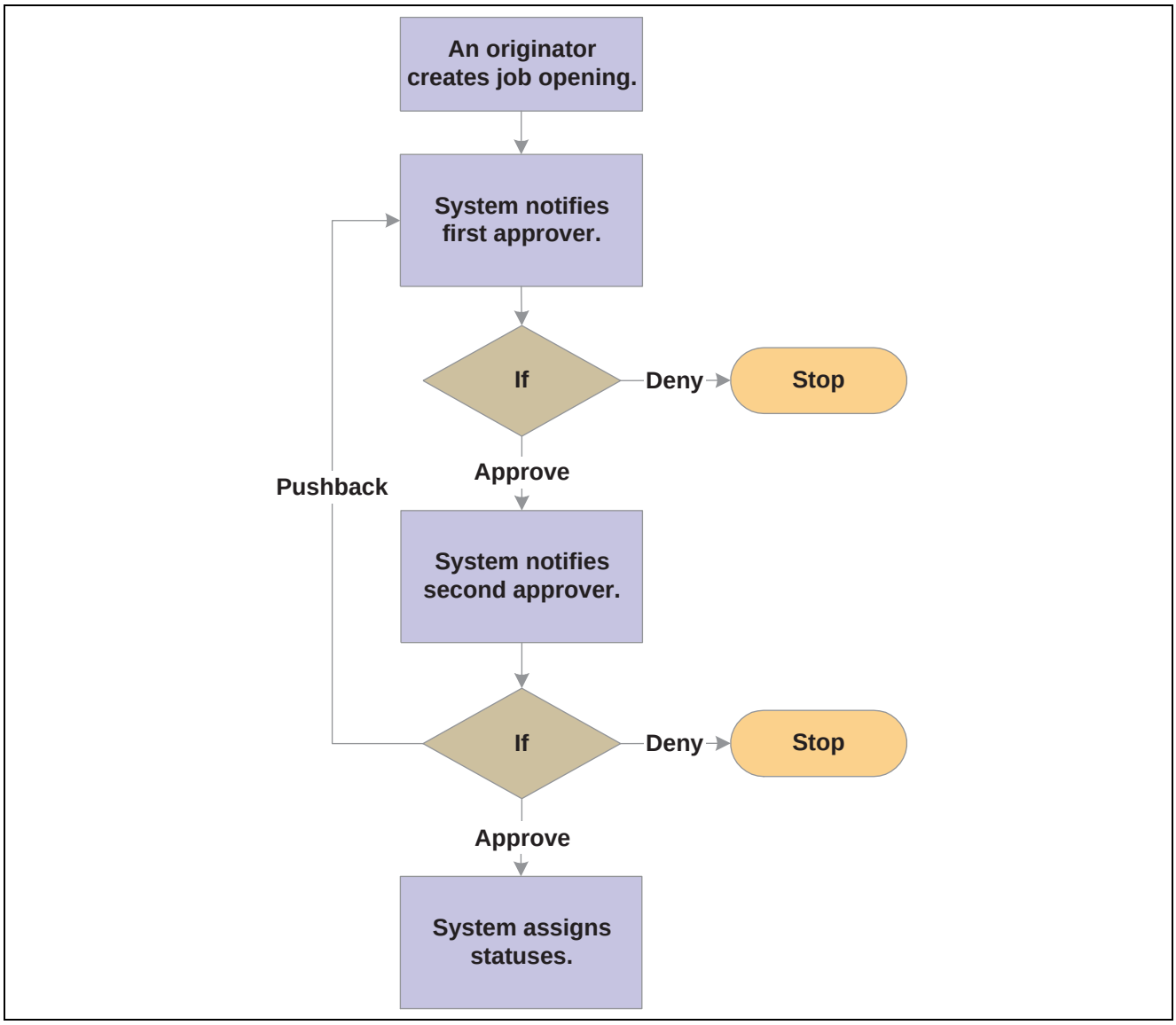
   The second approver is the recruiter or recruiters entered on the Job Opening page. When there are multiple recruiters, only one recruiter must approve the job opening. If you do not specify a recruiter, the system routes the approval request to the Recruiting Solutions Approval Administrator.

4. If the second approver approves the job opening, the system updates the status of the job opening to Open and ends the approval process.

During the approval process, an approver can change information on the job opening. If certain fields are changed that might require the job opening to be evaluated again, , a trigger is created and the system sends a notification back to the first approver to start the approval process over. The fields that can cause a trigger to occur are:

- Target Openings.
- Job Code.
- Position Number.
- Salary Administration Plan.
- From Salary Grade.
- To Salary Grade.
- Full-time/Part-time.
- Regular/Temporary.
- Standard Hours.
- (USF) Recruitment Type.
- (USF) Area of Consideration.
- (USF) Salary Range From.
- (USF) Salary Range To.
- (USF) Pay Frequency.
- (USF) Citizenship Status.

This diagram shows the delivered three-step job opening approval process:



Delivered two-step job opening approval process

See Also

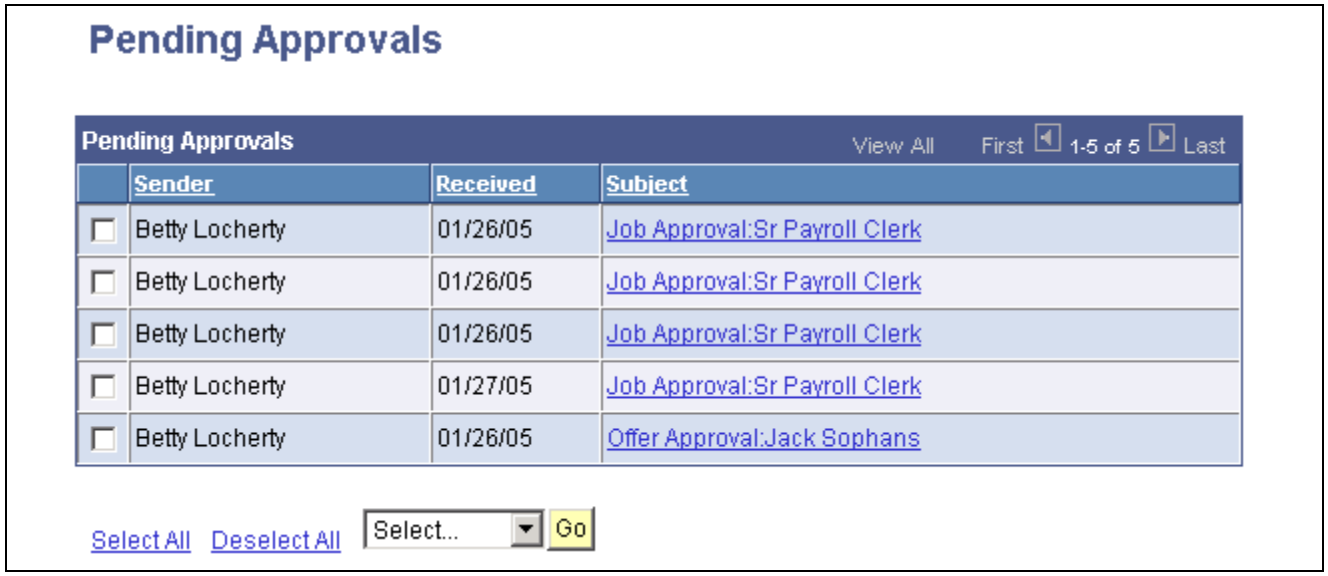
PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up and Working with Self-Service Transactions," Setting Up Direct Reports

Pages Used to Approve Job Openings

Page Name	Object Name	Navigation	Usage
Pending Approvals	HRS_RECRUIT_CONSOL	Recruiting, Pending Approvals, Pending Approvals	View pending approvals and approve job openings.
Job Opening - Job Approvals	HRS_JOB_OPENING	Click the subject link on the Pending Approvals page.	Approve a job opening or add approvers or reviewers to the approval process.
Insert additional approver or reviewer	NA	• Click the Insert Approver icon on the Job Opening - Job Approvals page. • Click the Insert Approver icon on the Manage Applicant - Disposition Details page.	Add approvers or reviewers to the approval process.

Viewing Pending Approvals

Access the Pending Approvals page.



Pending Approvals page

To approve or deny multiple pending approvals, select the check box for the job openings and job offers that you want to approve or deny, select *Approve* or *Deny* from the Select field and click Go. The system approves or denies the selected pending approvals and removes them from the page.

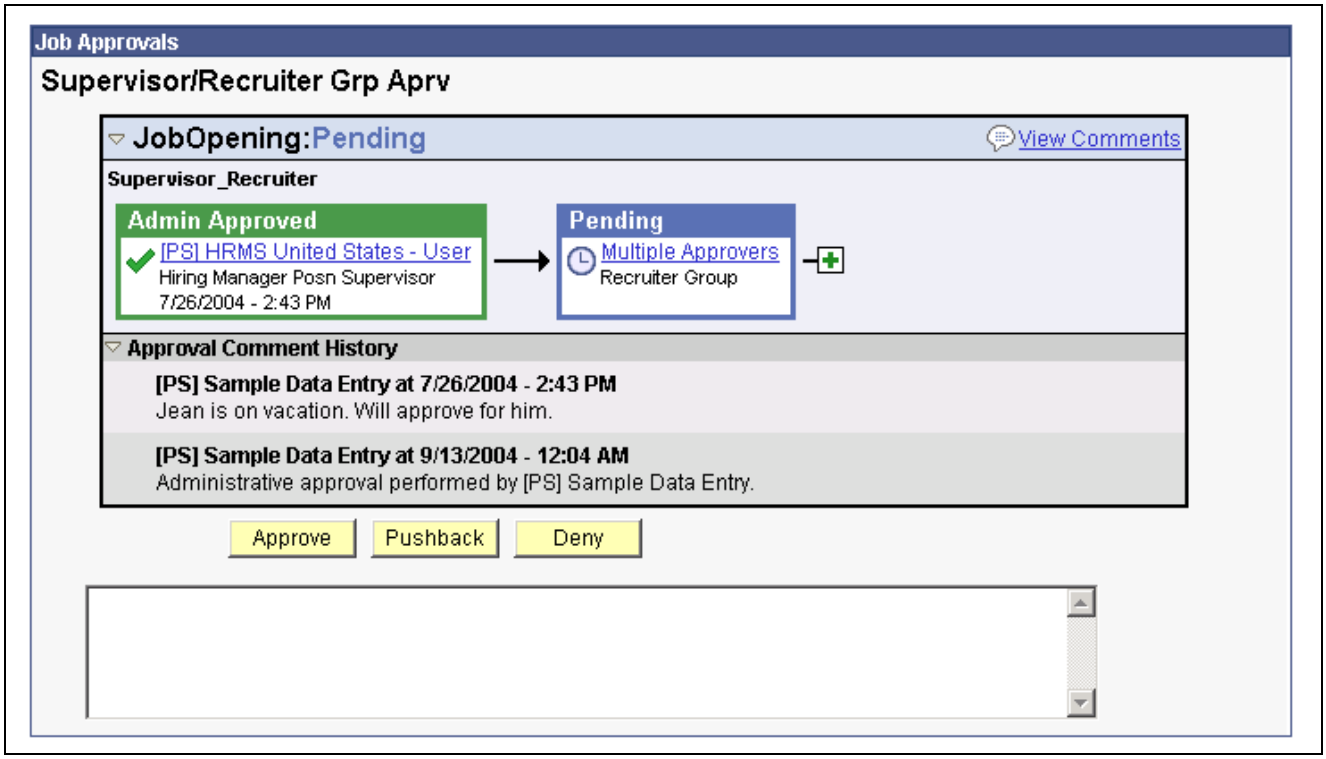
Subject

Click a job approval link to access the Job Opening page, where you can view details for and approve the job opening.

Click an offer approval link to access the Manage Applicant - Disposition Details page, where you can view details for and approve a job offer.

Approving a Job Opening

Access the Job Opening - Job Approvals page.



Job Opening - Job Approvals page

Job Opening: <status name>

Pending Click the name link to display the approver information box.

Click to access the Insert additional approver or reviewer page, where you can add approvers or reviewers to the approval process.

Approve Click to approve the job opening. When final approval is reached the system changes the job opening status from *Pending Approval* to *Open.*

Pushback Click to send a notification to the previous approver telling them the job opening needs to be changed.

Deny Click to reject the job opening and set the job opening status to *Closed.*

Adding Another Approver or Reviewer

Access the Insert additional approver or reviewer page.



Insert additional approver or reviewer page

User ID Select the user ID of the person that you want to add.

Insert as Specify whether this user is added as an approver or reviewer.

CHAPTER 9

Entering Applicants

This chapter provides an overview of applicant data, lists a common element, and discusses how to:

- Enter contact information.
- Enter application details.
- Enter references.
- Enter applicant eligibility and identity information.

Understanding Applicant Data

There are three ways to enter applicants in the system:

- Manually add applicants by using the Add New Applicant (HRS_ADD_APPLICANT) component.

  Before you manually add an applicant, use the Find Applicants (HRS_REC_SCHAPP) component to search for the applicant. This prevents you from entering applicants that already exist. If the applicant already exists, you can add a new application to the applicant's record for the job opening to which they are applying.
- Use a resume extractor to automatically extract data from applicant's resumes that you receive and populate the applicant data automatically.

  See Chapter 18, "Managing Resumes," Understanding Resume Management, page 377.
- Have applicants apply for job openings online using PeopleSoft Enterprise Candidate Gateway.

  See *PeopleSoft Enterprise Candidate Gateway 8.9 PeopleBook*, "Using Candidate Gateway," Applying for Job Openings.

Adding Applicants Manually

To add applicants manually:

1. Access the Add New Applicant component.
2. Enter contact information for the applicant on the Add New Applicant - Contact Details page.

   The system requires that you enter a first and last name.
3. Create applications for the applicant on the Add New Applicant - Applications page.

   You can create an application for a specific job opening or without a specific job opening. On the Add New Applicant - Application Details page, you can attach resumes and other documents and enter the following applicant information:

   - Preferences
   - Personal information

- Previous work experience
- Education
- Competencies
- Accomplishments
- (USF) Priority placement information
- (USF) Federal preferences

4. Enter references for the applicant on the Add New Applicant - Verification page.
5. Enter additional eligibility and identify information as required by the organization on the Add New Applicant - Eligibility & Identity page.

   Some of this information might be required to comply with local country regulatory requirements:

   - National identification information
   - Citizenship information
   - Visa and work permits
   - Bank accounts
   - Disability details
   - Accommodation requests and options

Note. When you hire an applicant, the system automatically copies the applicant information that you enter to the new employee records, so you don't have to enter it twice. You specify the information that you want the system to copy by using the Data Transfer to HR (HRS_MNG_HIR_STP) component.

Adding Internal Applicants

You must add internal applicants, both employees and nonemployees, by using the Add New Applicant component so that you can process their applications in the same way as external applicants. To distinguish between types of applicants, the system assigns applicants an applicant type: External, Employee, or Non-employee.

When you add an internal applicant, the system assigns the applicant an applicant type of Employee, and copies the applicant's national IDs, birth date, email addresses, phone numbers, home address, marital status, gender, prior work experience, competencies (self-evaluations only), languages, test results, licenses and certificates, memberships, school education, professional education, training history, and honors and awards from PeopleSoft Enterprise Human Resources tables to Recruiting Solutions tables.

You can make changes to the applicant's data as needed. When you hire the applicant, the system copies the applicant's data back to the Human Resources tables. You specify the information that you want the system to copy back to Human Resources by using the Data Transfer to HR component.

Application Dating

When an applicant first submits an application, the system assigns an application date based on the system date. If the applicant subsequently sends you an updated application, the system creates a new applicant record with a new application date. Information related to an applicant, such as prior work experience and disability information, is application-dated. This provides an audit trail of changes to applicant information so you have immediate access to historical applicant data.

See Also

Chapter 18, “Managing Resumes,” page 377

PeopleSoft Enterprise Candidate Gateway 8.9 PeopleBook

Chapter 2, “Setting Up the Recruiting Process,” Setting Up the Hiring Process, page 35

Common Element Used in this Chapter

Manage Applicant Activity Click this link to access the Manage Applicant page for the applicant. For this link to work, you must enter a first and last name for the applicant on the Add New Applicant - Contact Details page. When you click this link, if you haven’t already saved the page, the system saves the applicant and generates an applicant ID.

Entering Contact Information

This section provides an overview of contact information discusses how to enter contact information.

Understanding Contact Information

Enter contact information for an applicant on the Add New Applicant - Contact Details page. If the applicant is an internal applicant, the system populates the appropriate fields on this page with data from PeopleSoft Enterprise Human Resources tables after you select an employee ID in the EmplID field.

After you add contact information for an applicant, you can use the Manage Applicant - Applicant Data: Contact page to update the applicant’s information.

See Also

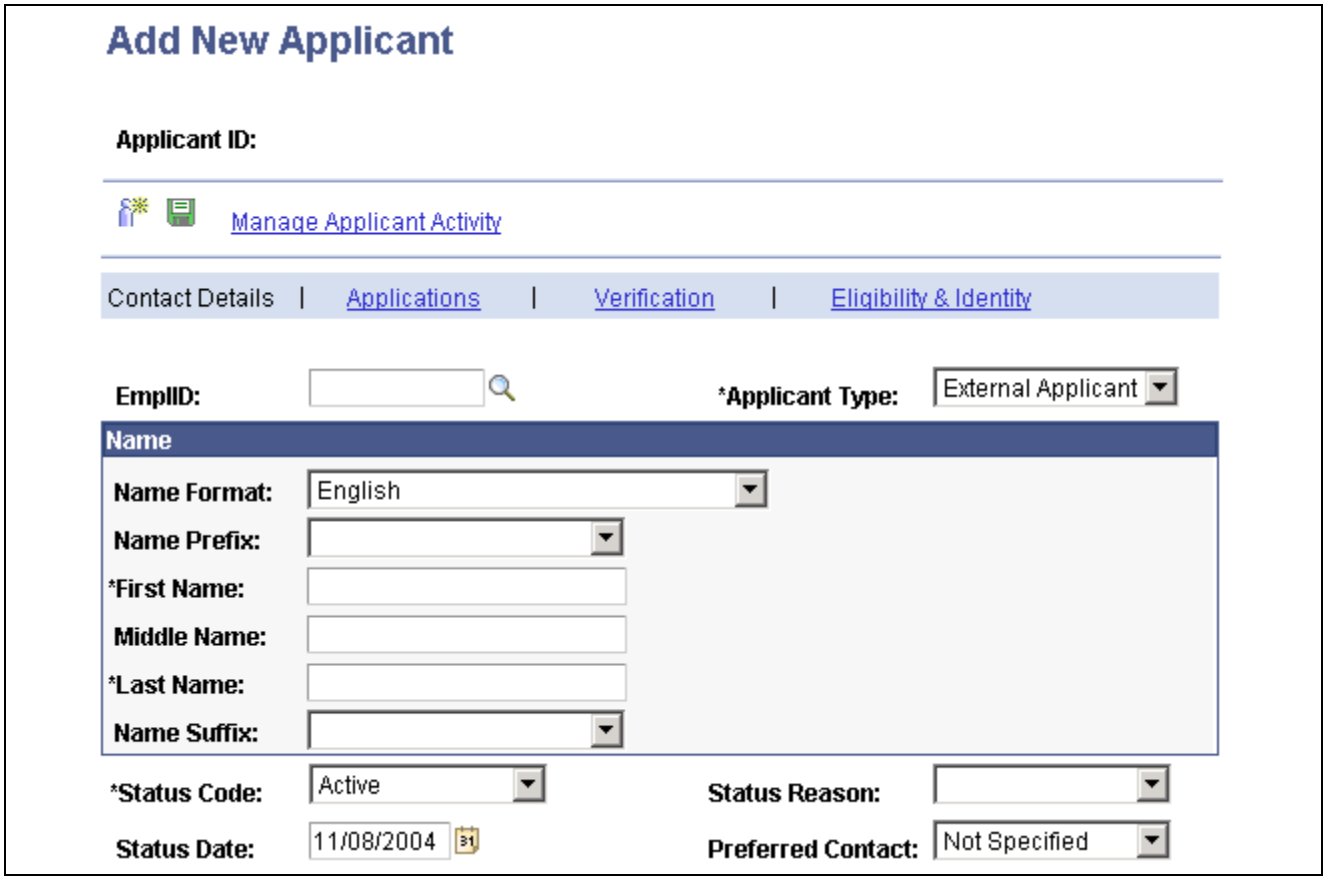
Chapter 17, “Managing Applicants,” Editing Contact Information, page 348

Page Used to Enter Contact Information

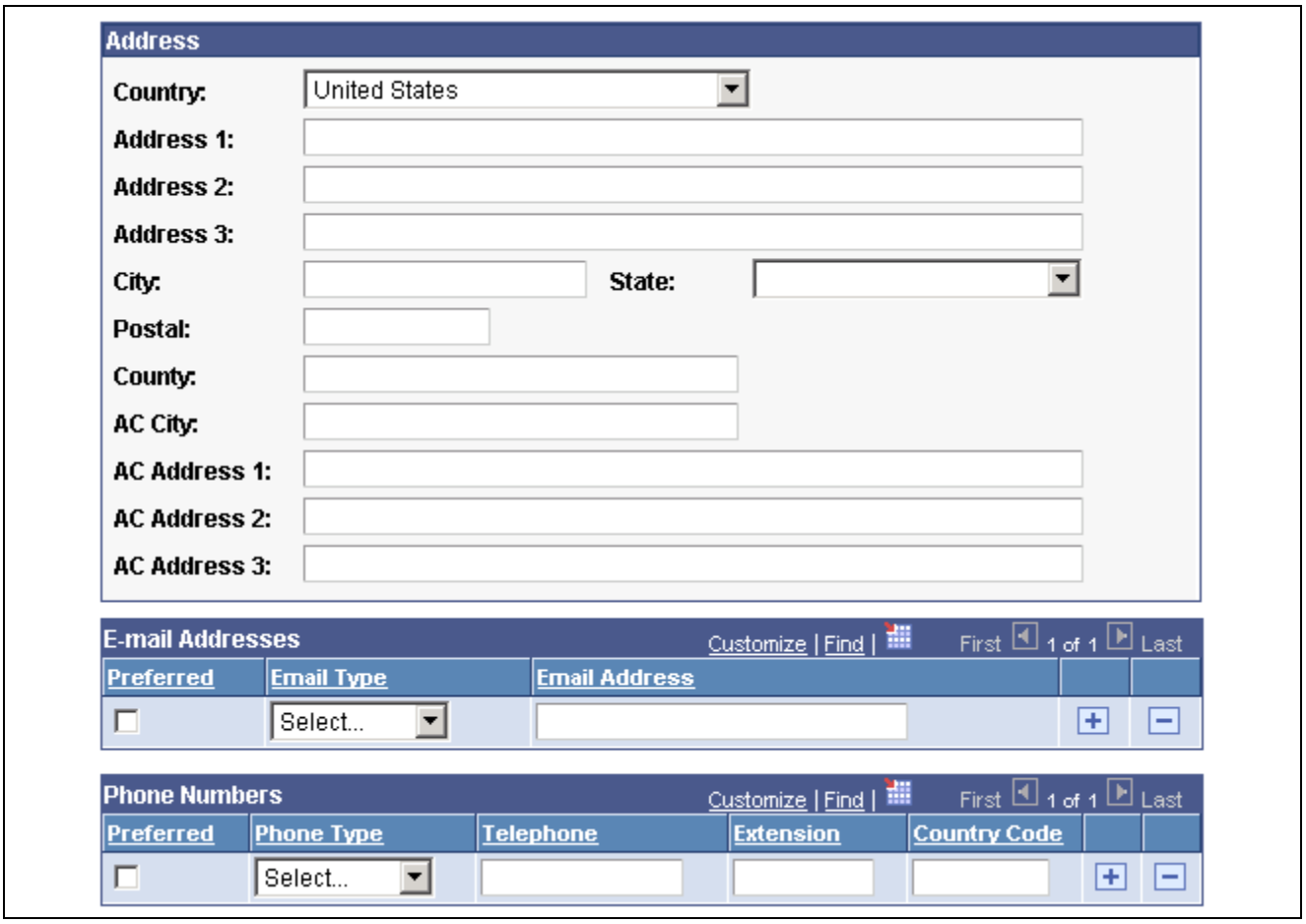
Page Name	Object Name	Navigation	Usage
Add New Applicant	HRS_ADD_APPLICANT	Recruiting, Add New Applicant, Add New Applicant	Add an applicant.
Add New Applicant - Contact Details	HRS_ADD_APPLICANT	• Click the Contact Details link on the Add New Applicant page. • Click the Add Applicant icon on the Add New Applicant page. • Click the Add Applicant icon on the Manage Applicant page.	Enter contact information for an applicant such as name, address, email, and phone information.

Entering Contact Information

Access the Add New Applicant - Contact Details page.



Add New Applicant - Contact Details page (1 of 2)



Add New Applicant - Contact Details page (2 of 2)

Applicant ID

The system automatically assigns a new applicant ID number when you save the new applicant record. To determine what number to assign, the system increments the number in the Applicant ID field on Last Assigned IDs page by one. The system assigns applicant IDs to all applicants, both internal and external, when you save the page.

EmplID

Select the employee ID for the applicant if the applicant is an internal applicant. For internal applicants, the system copies information from the PeopleSoft Enterprise Human Resources tables.

Applicant Type

Select the type of applicant. Values are *Employee, External Applicant,* and *Non-Employee.* The default is *External Applicant.*

Status Code

Select a status code. You can use the status values that are provided with PeopleSoft software or define your own status values and rules. Values are:

Active: This is the default status for new applicants. The system also assigns this status when an applicant's resume is in a Success status as part of the resume extraction process.

Hired: The system automatically selects *Hired* when you hire applicants. The system also updates the disposition status of other applicants who applied for the job. Do not manually set the status to *Hired,* as this will cause inconsistency in the applicant data.

Inactive: Use this status for applicants that have withdrawn. When you change an applicant's status to *Inactive,* the status of any job openings that they have applied for is set to *Withdrawn.* The system excludes inactive applicants from job opening screening.

The system also assigns this status when an applicant's resume is in a Rejected status as part of the resume extraction process.

Queued: The system assigns this status when an applicant's resume is in a Draft or Unresolved status as part of the resume extraction process.

A recruiter could also set this status on the Add New Applicant or Manage Applicant pages if they wanted to note that this applicant needs additional information to be collected or some other action before becoming an active applicant.

Status Reason Select a status reason. Define status reasons for status codes on the Status/Reason Definition page.

Status Date Enter a status date. This field is used only for informational purposes. You can use this date for equal employment opportunity (EEO) reporting and other auditing functions.

Preferred Contact Select the preferred method of contact for the applicant. Values are: *EMail, Mail, Not Specified,* and *Phone.*

Name

Use this group box to enter name information for the applicant.

Address

Use this group box to enter address information for the applicant. The fields that appear change depending on the country that you select in the Country field. Define address formats on the Address Format page in the Country Table (COUNTRY_TABLE) component.

E-mail Addresses

Use this group box to enter email address information for the applicant.

Preferred Select the preferred email address. The system uses an applicant's preferred email address as the default when it sends correspondence and notifications. The preferred email address also appears on pages throughout the system. If you enter more than one email address for an applicant, you must select a preferred email address.

Phone Numbers

Use this group box to enter phone information for the applicant.

Preferred Select the applicant's preferred phone number. The preferred phone number appears on pages throughout the system. If you enter more than one phone number for an applicant, you must select a preferred phone number.

Entering Application Details

This section provides an overview of applications and discusses how to:

- View applications.
- Enter application details.
- Add work experience information.
- Add primary education information.
- Add secondary education information.
- Add competencies.
- (USF) Enter priority placement information.

Understanding Applications

Create applications for an applicant on the Add New Applicant - Applications page. If the applicant is an internal applicant, the system populates the appropriate fields on this page with data from PeopleSoft Enterprise Human Resources tables after you select an employee ID in the EmplID field on the Add New Applicant - Contact Details page.

After you create an application for an applicant, you can use the Manage Applicant - Applicant Data: Applications & Resumes page to update the information.

You can create an unlimited number of applications for an applicant. Each application can be linked to a different job opening, but you can also create applicants without linking them to a job opening.

See Also

Chapter 17, “Managing Applicants,” Editing Applications and Resumes, page 342

Pages Used to Enter Application Details

Page Name	Object Name	Navigation	Usage
Add New Applicant - Applications	HRS_ADD_APPLICANT	Recruiting, Add New Applicant, Add New Applicant Click the Applications link on the Add New Applicant page.	View an applicant’s applications and add new applications.

Page Name	Object Name	Navigation	Usage
Add New Applicant - Application Details	HRS_APP_PROFILE	• Click the Add Application link on the Add New Applicant - Applications page. • Click the Edit Application link on the Add New Applicant - Applications page. • Click the Add Application link on the Manage Applicant - Applicant Data: Applications & Resumes page. • Click the View Application link on the Manage Applicant - Applicant Data: Applications & Resumes page.	Enter application details.
Resume Text Printable Version	HRS_RESDTL_SEC	• Click the Printable Version link on the Add New Applicant - Application Details page. • Click the Printable Version link on the Manage Applicant - Application Details page.	Print resume text.
Employment History	HRS_APP_WRK_SEC	• Click the Add Work Experience link on the Add New Applicant - Application Details page. • Click the Edit Employment History link on the Add New Applicant - Application Details page. • Click the Add Work Experience link on the Manage Applicant - Application Details page. • Click the Edit Employment History link on the Manage Applicant - Application Details page.	Enter work experience information for an applicant.

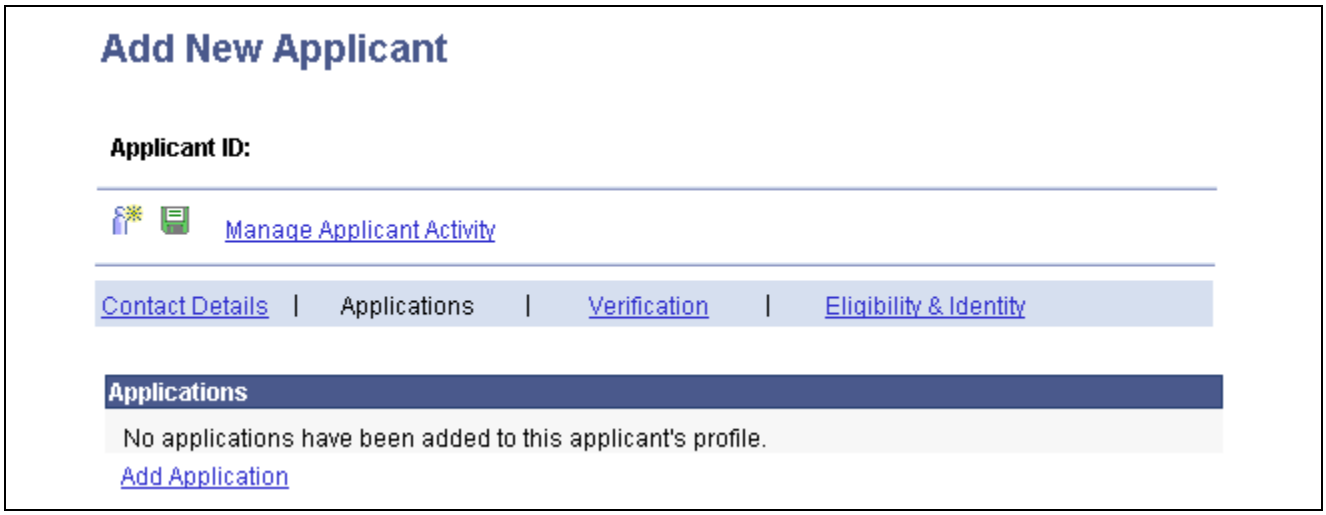
Page Name	Object Name	Navigation	Usage
Primary Education	HRS_APP_PRI_ED_SEC	• Click the Add Primary Education link on the Add New Applicant - Application Details page. • Click the Edit Primary Education link on the Add New Applicant - Application Details page. • Click the Add Primary Education link on the Manage Applicant - Application Details page. • Click the Edit Primary Education link on the Manage Applicant - Application Details page.	Enter primary education information for an applicant.
Secondary Education	HRS_APP_DEG_SEC	• Click the Add Secondary Education link on the Add New Applicant - Application Details page. • Click the Edit Secondary Education link on the Add New Applicant - Application Details page. • Click the Add Secondary Education link on the Manage Applicant - Application Details page. • Click the Edit Secondary Education link on the Manage Applicant - Application Details page.	Enter secondary education information for an applicant.
Licenses and Certificates	HRS_APP_LIC_SEC	• Click the Add Licenses and Certificates link on the Add New Applicant - Application Details page. • Click the Edit Licenses and Certificates link on the Add New Applicant - Application Details page. • Click the Add Licenses and Certificates link on the Manage Applicant - Application Details page. • Click the Edit Licenses and Certificates link on the Manage Applicant - Application Details page.	Enter license and certificate information for an applicant.

Page Name	Object Name	Navigation	Usage
Languages	HRS_APP_LANG_SEC	• Click the Add Languages link on the Add New Applicant - Application Details page. • Click the Edit Languages link on the Add New Applicant - Application Details page. • Click the Add Languages link on the Manage Applicant - Application Details page. • Click the Edit Languages link on the Manage Applicant - Application Details page.	Enter language information for an applicant.
Memberships	HRS_APP_MBR_SEC	• Click the Add Memberships link on the Add New Applicant - Application Details page. • Click the Edit Memberships link on the Add New Applicant - Application Details page. • Click the Add Memberships link on the Manage Applicant - Application Details page. • Click the Edit Memberships link on the Manage Applicant - Application Details page.	Enter membership information for an applicant.
Honors and Awards	HRS_APP_HON_SEC	• Click the Add Honors and Awards link on the Add New Applicant - Application Details page. • Click the Edit Honors and Awards link on the Add New Applicant - Application Details page. • Click the Add Honors and Awards link on the Manage Applicant - Application Details page. • Click the Edit Honors and Awards link on the Manage Applicant - Application Details page.	Enter honors and awards information for an applicant.

Page Name	Object Name	Navigation	Usage
Evaluate Competencies - Add New Evaluation	HRS_APP_EVAL	• Click the Add Competencies link on the Add New Applicant - Application Details page. • Click the Add Competencies link on the Manage Applicant - Application Details page.	Enter competency information for an applicant.
Evaluate Competencies - View Evaluation Detail	HRS_APP_EVAL	• Click the Edit Competencies link on the Add New Applicant - Application Details page. • Click the Edit Competencies link on the Manage Applicant - Application Details page.	Edit competency information for an applicant.
Application Details - Add Priority Placement	HRS_CE_ADM_PP	• Click the Add Priority Placement link on the Add New Applicant - Application Details page. • Click the Edit Priority Placement link on the Add New Applicant - Application Details page. • Click the Add Priority Placement link on the Manage Applicant - Application Details page. • Click the Edit Priority Placement link on the Manage Applicant - Application Details page.	Enter priority placement information for an applicant.

Viewing Applications

Access the Add New Applicant - Applications page.



Add New Applicant - Applications page

Applications

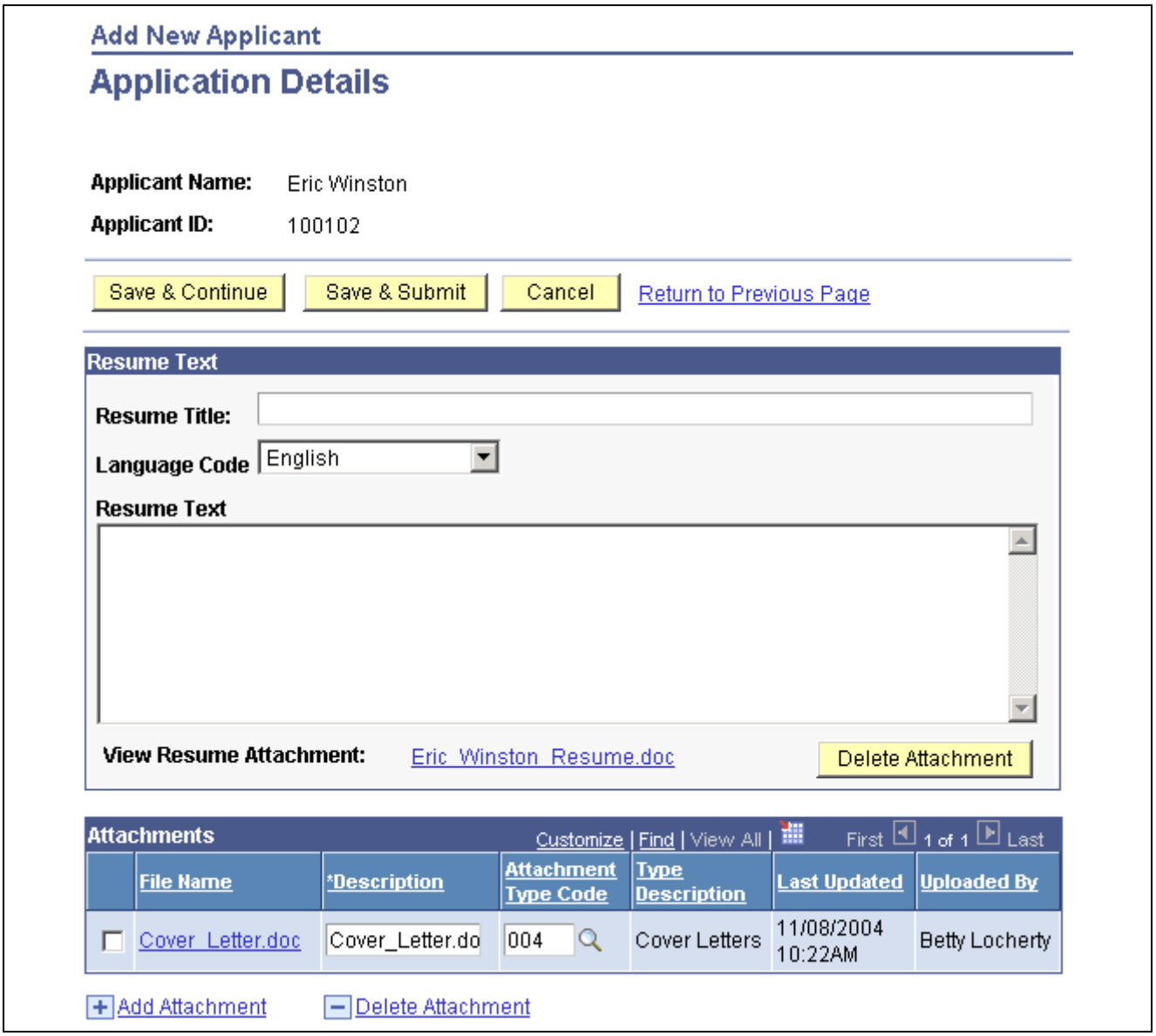
Use this group box to view and make changes to applications that have been added to the applicant's profile and add new applications.

Add Application Click to access the Add New Applicant - Application Details page, where you can enter application details for a new application. For this link to work, you must enter a first and last name for the applicant on the Add New Applicant - Contact Details page. When you click this link, if you haven't already saved the page, the system saves the applicant and generates an applicant ID.

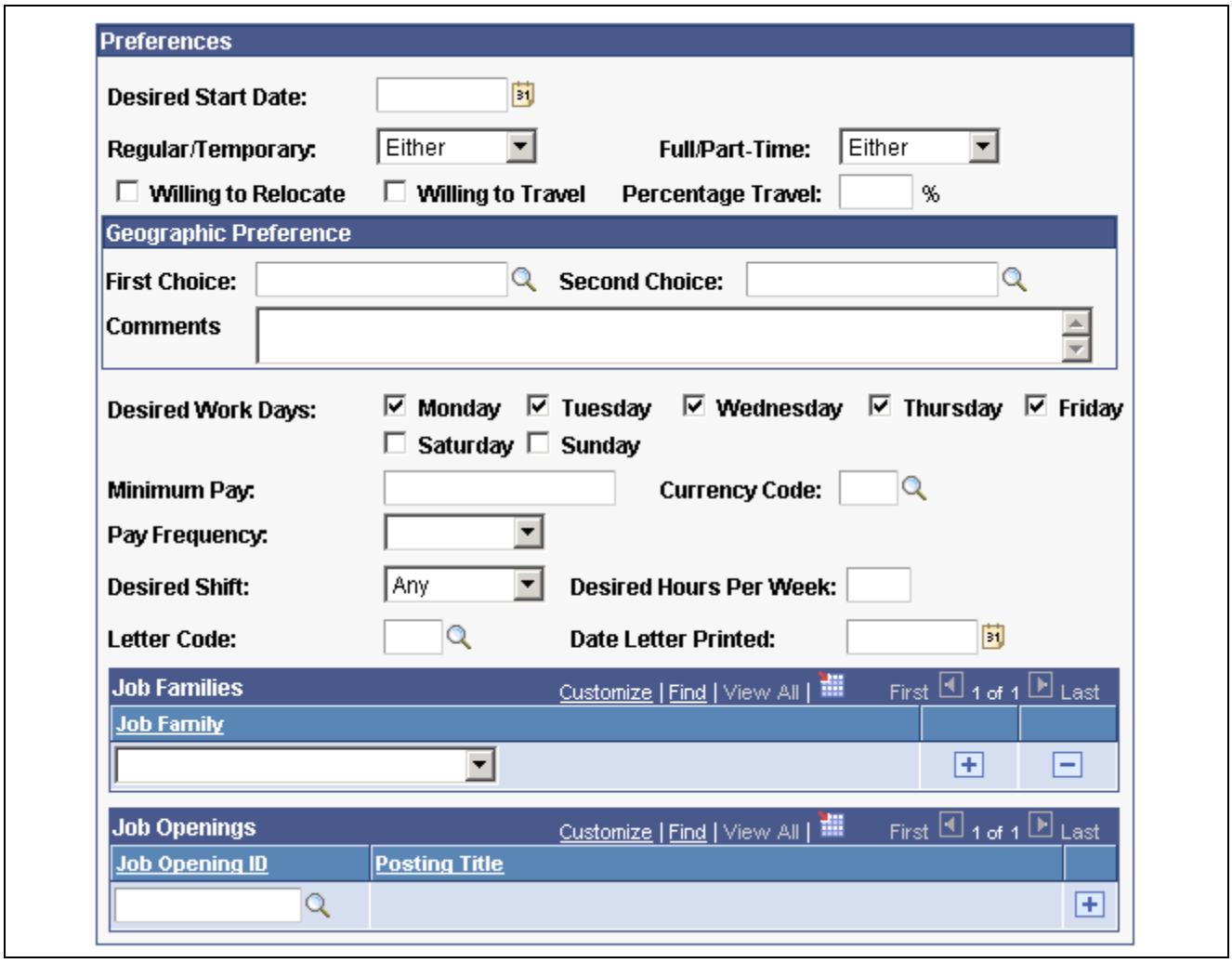
Edit Application Click to access the Add New Applicant - Application Details page, where you can edit an existing application.

Entering Application Details

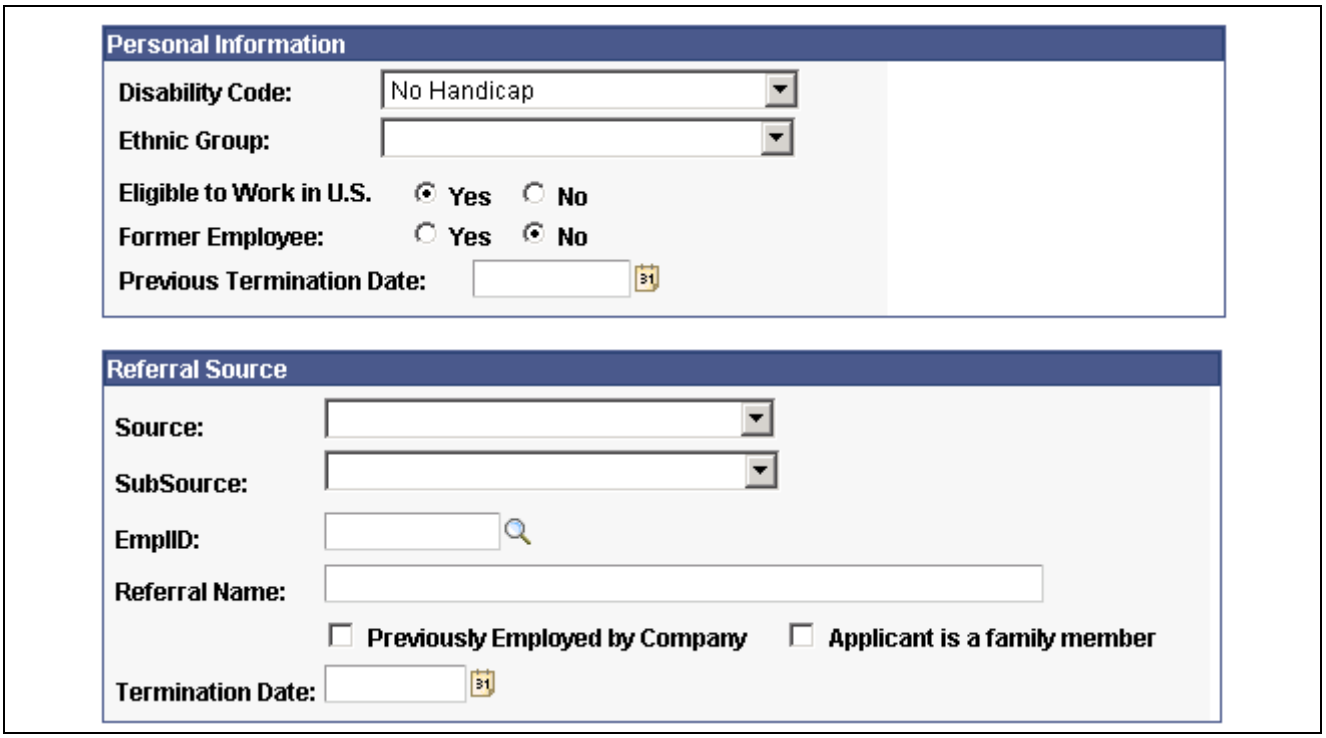
Access the Add New Applicant - Application Details page.



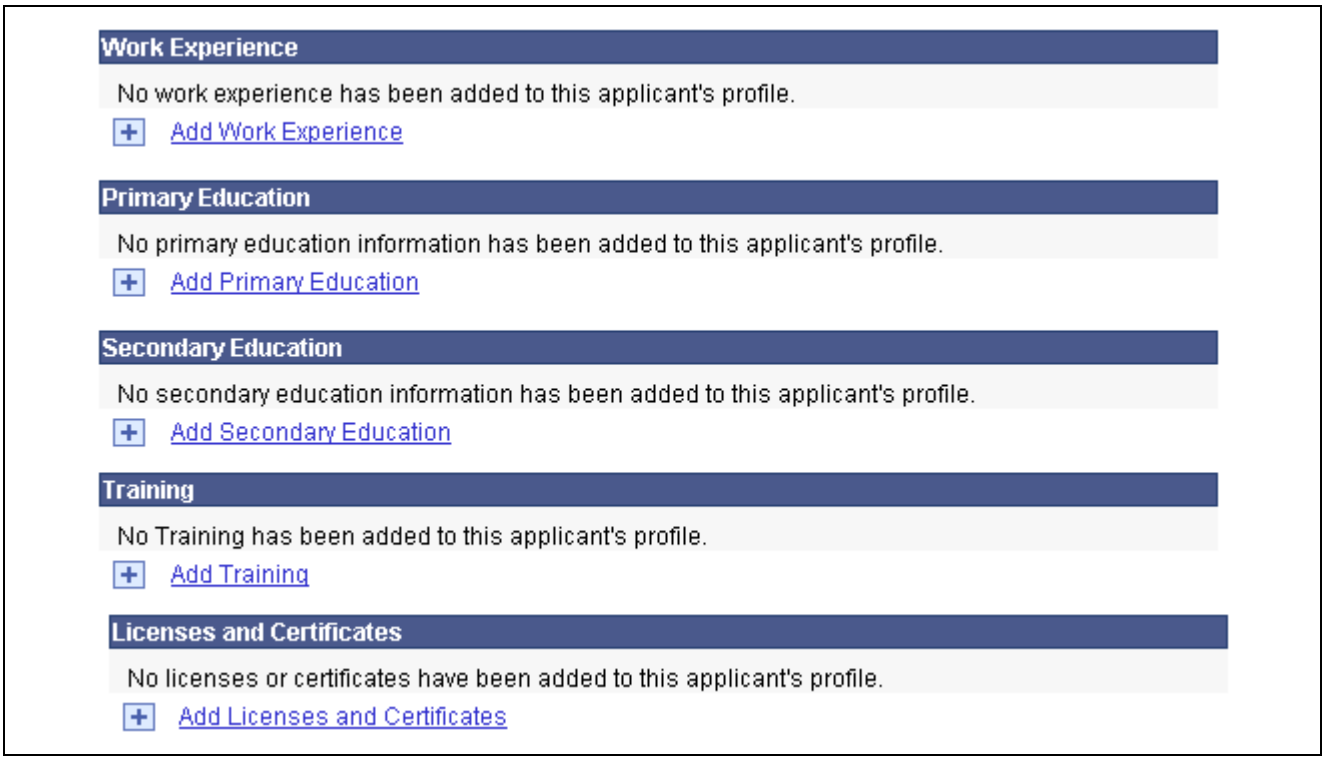
Add New Applicant - Application Details page (1 of 6)



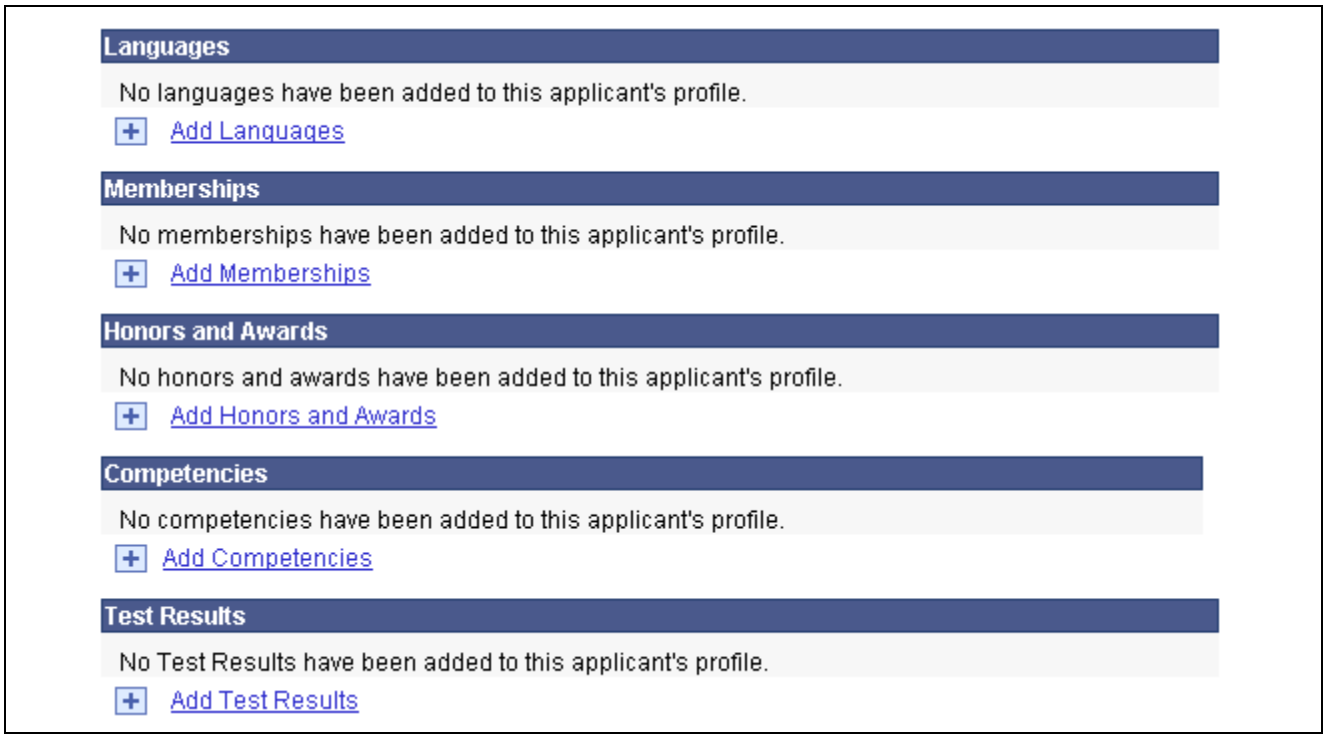
Add New Applicant - Application Details page (2 of 6)



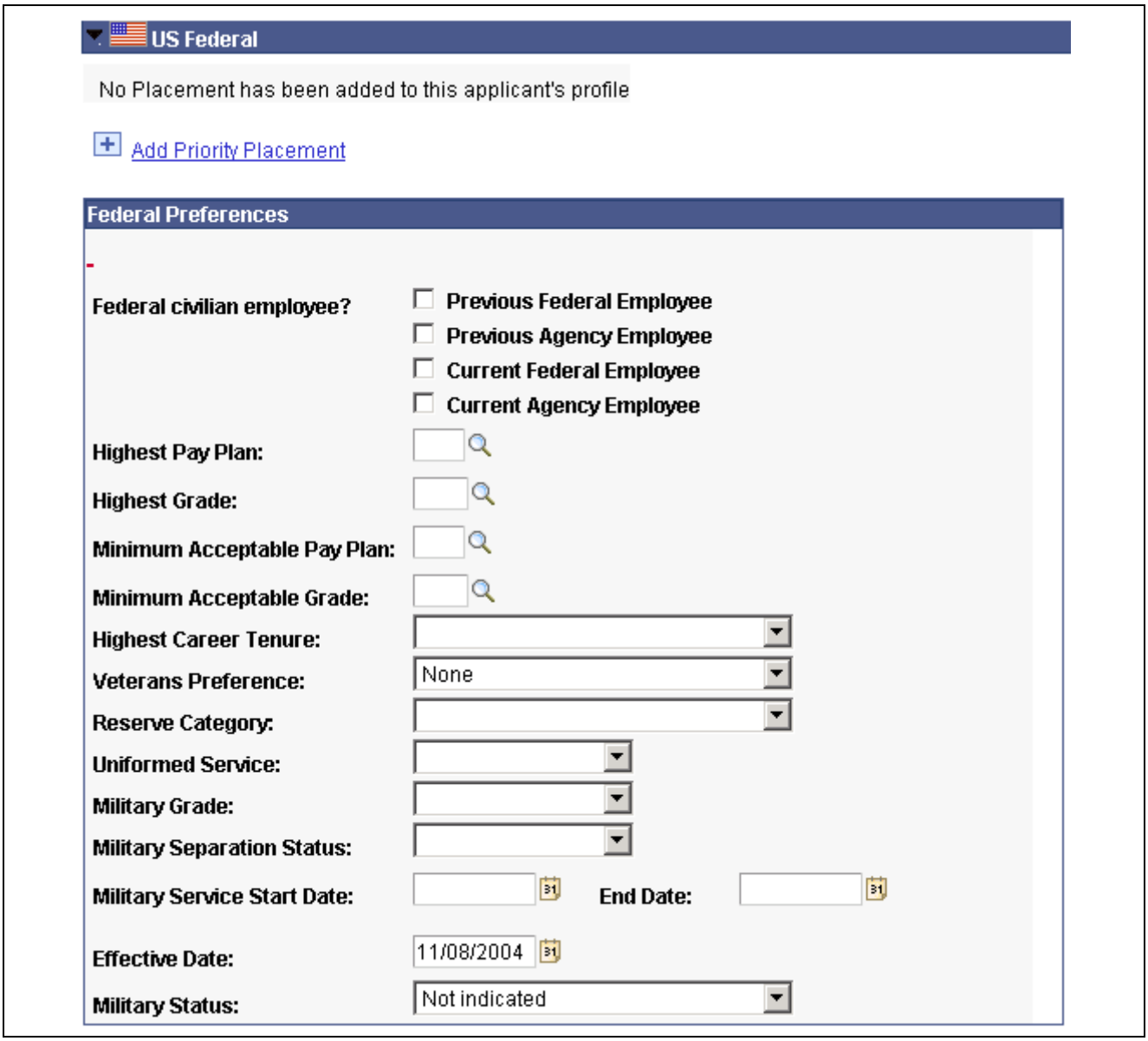
Add New Applicant - Application Details page (3 of 6)



Add New Applicant - Application Details page (4 of 6)



Add New Applicant - Application Details page (5 of 6)



Add New Applicant - Application Details page (6 of 6)

Applicant Name Displays the applicant's name. You must enter a first and last name for the applicant on the Add New Applicant - Contact Details page before you can access this page.

Resume Text

Use this group box to attach an applicant's resume if the resume information is in text-only format.

Resume Title Enter a title for the resume.

Language Code Select the language in which the resume is written.

Resume Text Enter or paste the text of the applicant's resume.

Printable Version Click to access the Resume Text Printable Version page, where you can view and print the applicant's resume. This link appears only if you enter resume text in the Resume Text field and submit the application.

Add Resume Attachment Click to browse for and upload a resume. After the resume is successfully attached, the View Resume Attachment field and the Delete Attachment button appears on the page and the system removes the Add Resume Attachment link from the page.

View Resume Attachment Click the filename link to view the resume. The system opens the resume in a separate browser window. This field appears only after you attach a resume. If you delete the attached resume, the system removes this field from the page.

Delete Attachment Click to delete an attached resume. This button appears only after you attach a resume. After you delete an attached resume, the Add Resume Attachment link appears and the system removes the View Resume Attachment and Delete Attachment options from the page.

Attachments

Use this group box to attach additional files such as cover letters and transcripts. The fields in this group box do not appear until you add an attachment.

Filename Displays the name of the file that you uploaded. Click to view the attachment. The system opens the attachment in a separate browser window.

Description Enter a description for the filename. The system populates this field to match with the attachment filename but you can change it.

Attachment Type Code and **Type Description** Select an attachment type. Define attachment types on the Attachment Type Setup page. When you select an attachment type the system populates the Type Description column with the short description that you enter on the Attachment Type Setup page. The system uses the Attachment Type Code field to determine whether the maximum number of attachments of this type has been reached for the applicant.

Last Updated Displays the date and time that the attachment entry was last modified.

Uploaded By Displays the user that uploaded the attachment.

Add Attachment Click to add a new attachment.

Delete Attachment Click to delete the selected attachments.

Preferences

Desired Start Date Enter the date that the applicant would like to start working.

Regular/Temporary Select *Regular* if the applicant is seeking a permanent job, *Temporary* if the applicant wants a temporary contract, or *Either* if the applicant is willing to consider both.

Full/Part-Time Select *Full-Time* or *Part-Time* if the applicant is seeking a particular type of job or *Either* if the applicant is willing to consider both full-time and part-time jobs.

Willing to Travel and **Percentage Travel** — Select if the applicant is willing to travel for work and enter a value in Percentage Travel field to indicate the amount of time the applicant is willing to spend travelling.

Willing to Relocate — Select if the applicant is willing to move to a new location.

Desired Work Days — Select the days that the applicant is willing to work.

Minimum Pay, Currency Code, and **Pay Frequency** — Enter the amount that the applicant will accept, select the currency code, and specify the related unit in the Pay Frequency field.

For example, if the applicant will accept a pay rate of 70,000 CAD per year, enter *70,000* in the Minimum Pay field, select *CAD* in the Currency Code field, and select *Year* in the Pay Frequency field.

Desired Shift — If the applicant wants shift work, select the appropriate shift from the available options.

Desired Hours Per Week — Enter the number of hours that the applicant is willing to work per week and select the days that the applicant wants to work.

Letter Code — Select the letter code if you want to generate a form letter to send to the applicant. Define additional letter codes on the Standard Letter Table page.

Date Letter Printed — Displays the date that the letter was printed. The system automatically populates this field after you generate the letter.

Geographic Preference

First Choice and **Second Choice** — Select the applicant's first and second location choices, if the applicant has expressed preferred locations for work. The recruiting locations that appear in these prompts are those that are associated with the set ID for the business unit to which the user belongs. Define recruiting locations on the Recruiting Location page.

See Chapter 2, "Setting Up the Recruiting Process," Defining Recruiting Locations, page 12.

Comments — Enter comments about an applicant's geographic preference. This is a free-format field so you can use this field to suit the needs of the organization. For example, you could use the field to indicate national regions, such as north or west, or international regions.

Job Families

Job Family — Select one or more job families that the applicant is interested in. Define job families on the Job Family page.

Job Openings

Job Opening ID — If the applicant applied for a specific job opening or you have identified a suitable job opening, select the job opening from the list of open job openings. Otherwise, leave this field blank. You can link the applicant to more than one job opening. The system creates one application, even when you link the applicant to multiple job openings.

Personal Information

(USF) Disability Code — If the applicant is disabled, select the code that identifies the type of disability. Otherwise, select *No Handicap.* Define disability codes on the Handicap Table page.

(USF) Ethnic Group — Select an ethnic group or select *Not Specified* if the applicant did not specify their ethnic group.

Eligible to Work in U.S. — Specify whether or not the applicant is eligible to work in the United States.

Former Employee and **Pervious Termination Date** — Specify whether or not the applicant is a former employee and enter the applicant's last day worked if known.

Referral Source

Use this group box to enter referral information for the applicant. You can select Employee and Marketing type recruitment sources in the Source field. When you select an Employee type recruitment source, the system adds the EmplID, Referral Name, Termination Date, Previously Employed by Company, and Applicant is a family member fields to the group box, which enable you to enter additional information about the employee that referred the applicant.

Work Experience

Add Work Experience and **Edit Employment History** — Click to access the Employment History page, where you can enter new or edit existing work experience information for the applicant.

Primary Education

Add Primary Education and **Edit Primary Education** — Click to access the Primary Education page, where you can enter new or edit existing primary education information for the applicant.

Secondary Education

Add Secondary Education and **Edit Secondary Education** — Click to access the Secondary Education page, where you can enter new or edit existing secondary education information for the applicant.

Licenses and Certificates

Add Licenses and Certificates and **Edit Licenses and Certificates** — Click to access the Licenses and Certificates page, where you can enter new or edit existing license and certificate information for the applicant.

Languages

Add Languages and **Edit Languages** — Click to access the Languages page, where you can enter new or edit existing language information for the applicant.

Memberships

Add Memberships and **Edit Memberships** — Click to access the Memberships page, where you can enter new or edit existing membership information for the applicant.

Honors and Awards

Add Honors and Awards and **Edit Honors and Awards** — Click to access the Honors and Awards page, where you can enter new or edit existing honors and awards information for the applicant.

Competencies

Add Competencies — Click to access the Evaluate Competencies - Add New Evaluation page, where you can enter new competency information for the applicant.

Edit Competencies — Click to access the Evaluate Competencies - View Evaluation Detail page, where you can edit existing competency information for the applicant.

(USF) Priority Placement

Add Priority Placement and **Edit Priority Placement** — Click to access the Application Details - Add Priority Placement page, where you can enter new or edit existing priority placement information for the applicant.

(USF) Federal Preferences

Use this group box to enter federal preferences.

Federal Civilian Employee — Select the appropriate check box to indicate whether the applicant is a current or previous employee of the federal government or an agency.

Highest Pay Plan and **Highest Grade** — Select the highest pay plan or grade that the applicant will accept.

Minimum Acceptable Pay Plan and **Minimum Acceptable Grade** — Select the minimum pay plan or grade that the applicant will accept.

Highest Career Tenure — Select the applicant's highest career tenure. Values are *Conditional, Indefinite, None,* and *Permanent.* This field is used for reduction in force.

Veterans Preference — Select the veterans hiring preference that applies. Define veterans preference values on the Setup Veterans Preference page.

Reserve Category — Select the employee's reserve category, or select *Not Applicable.*

Uniformed Service — Select the type of uniformed service in which this veteran served. Values are: *Air Force, Army, Coast Guard, Marines,* and *Navy.*

Military Grade — Select the veterans military grade.

Military Separation Status — Select the veterans military separation status.

Effective Date — Enter the effective date for the applicant's military status.

Military Status — Select the applicant's military status.

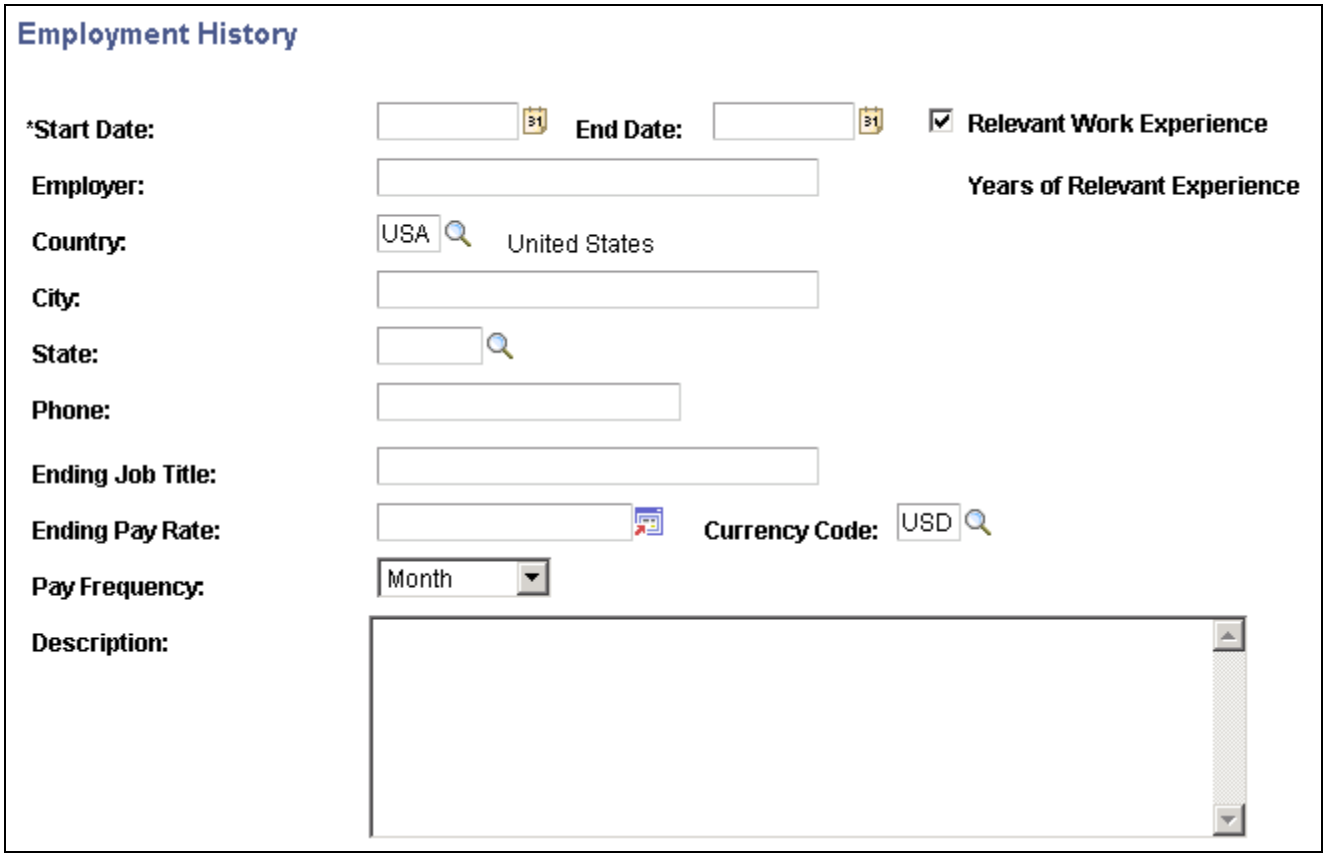
Additional Page Elements

Save and Continue — Click to save the application and continue entering information.

Save and Submit Click to save and submit the application. The Add New Applicant - Applications page appears and the application that you submitted appears in the Applications group box.

Adding Work Experience Information

Access the Employment History page.



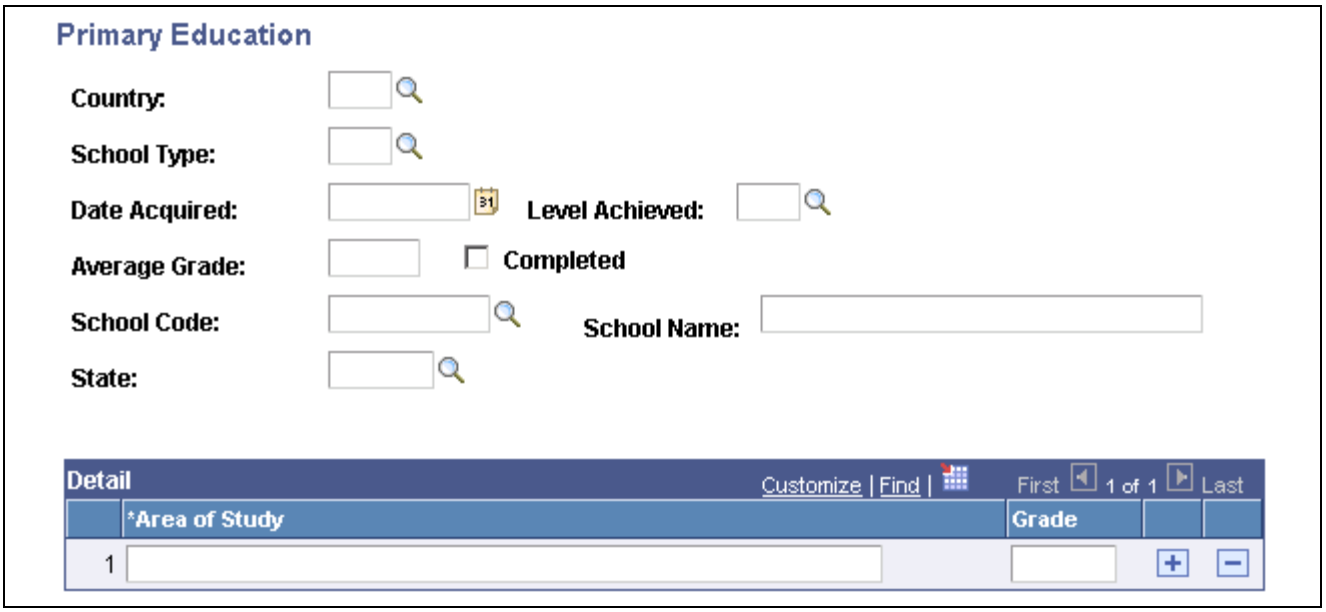
Employment History page

The fields on this page are the same as the fields on the Prior Work Experience page in PeopleSoft Enterprise Human Resources Administer Workforce.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Entering Additional Data in Human Resources Records," Tracking Prior Work Experience.

Adding Primary Education Information

Access the Primary Education page.



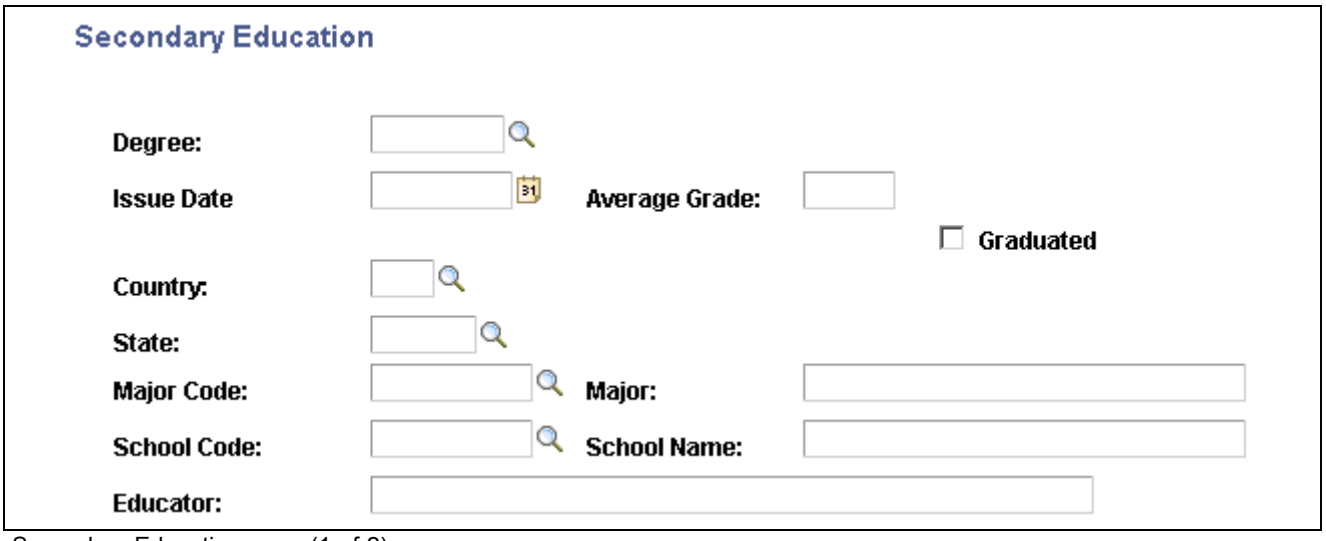
Primary Education page

The fields on this page are the same as the fields on the School Education page in PeopleSoft Enterprise Human Resources Manage Competencies.

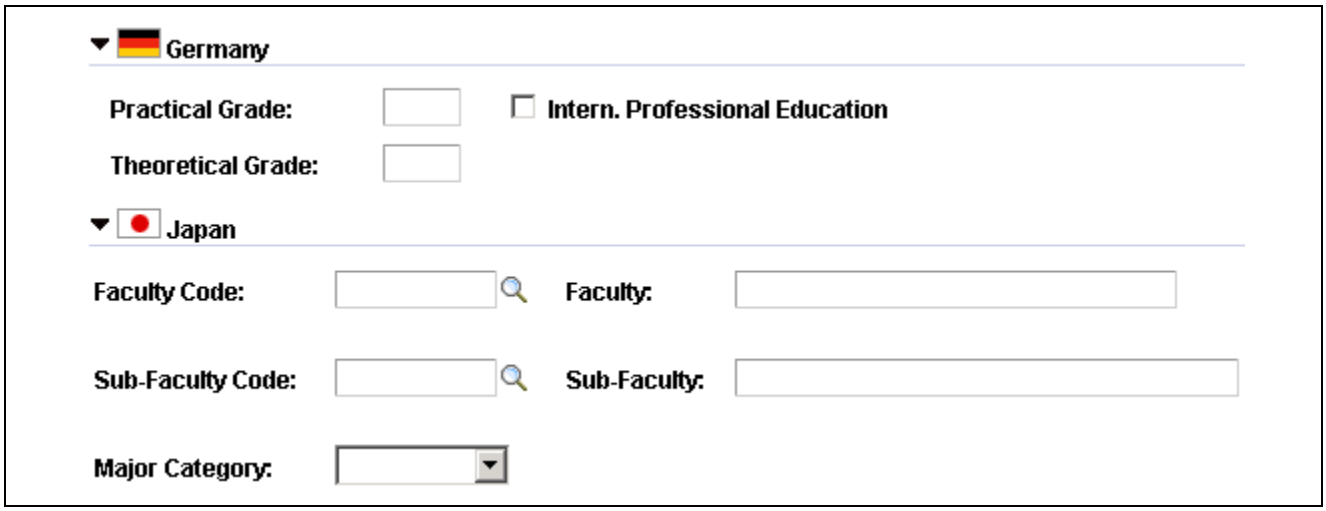
See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies*, "Tracking Employee Competencies and Accomplishments," Tracking Educational Background.

Adding Secondary Education Information

Access the Secondary Education page.



Secondary Education page (1 of 2)



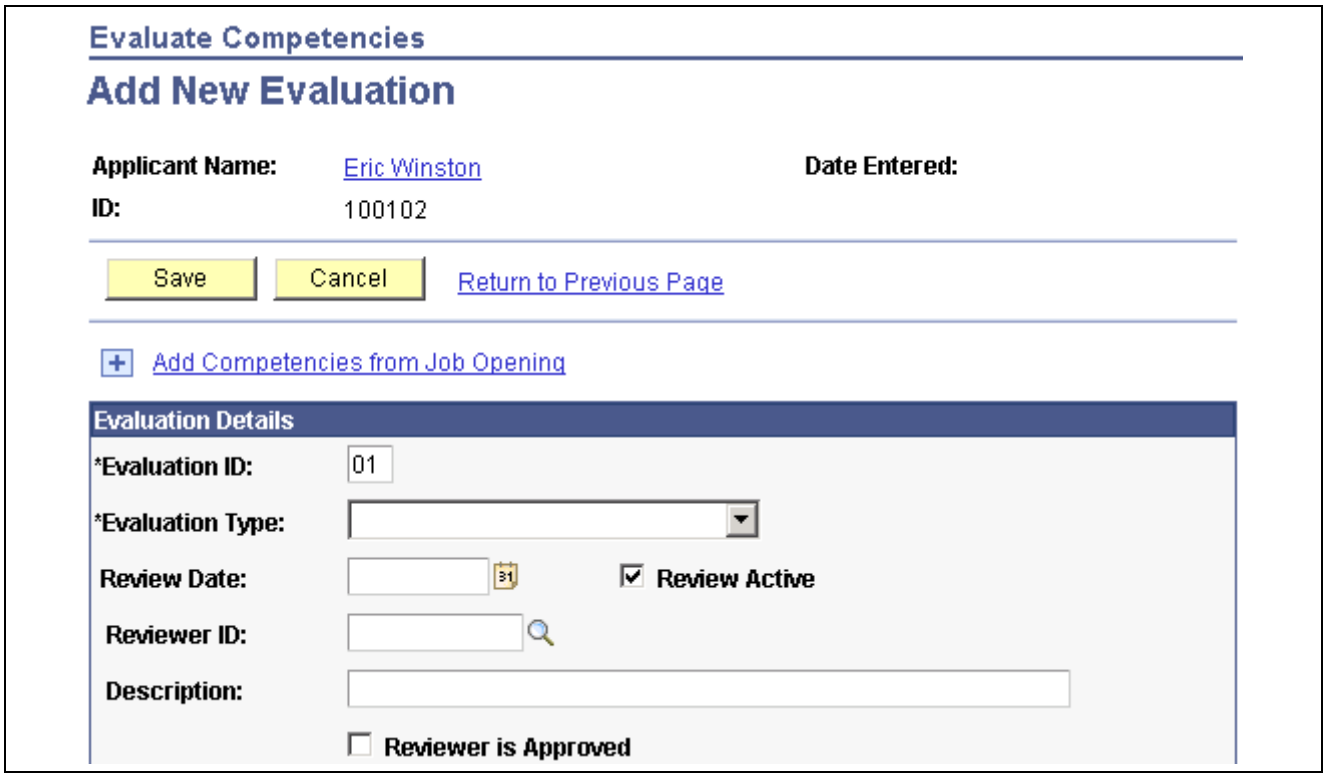
Secondary Education page (2 of 2)

The fields on this page are the same as the fields on the Professional Ed. and Training (professional education and training) page in PeopleSoft Enterprise Human Resources Manage Competencies.

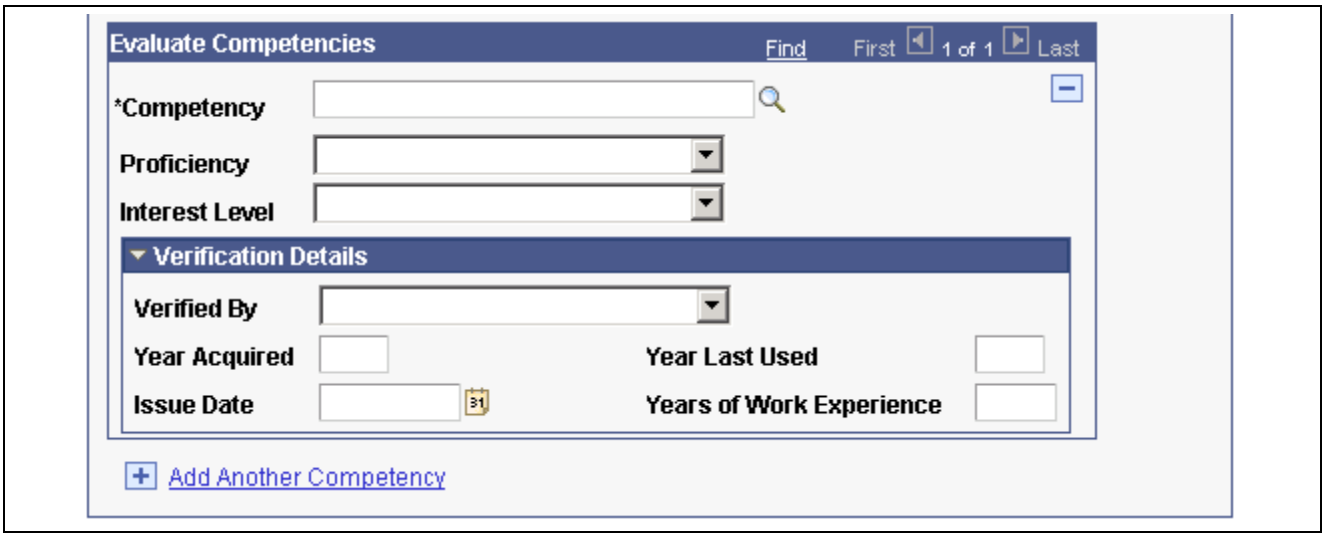
See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies*, "Tracking Employee Competencies and Accomplishments," Tracking Professional Education and Training.

Adding Competencies

Access the Evaluate Competencies - Add New Evaluation page or the Evaluate Competencies - View Evaluation Detail page.



Evaluate Competencies - Add New Evaluation page (1 of 2)



Evaluate Competencies - Add New Evaluation page (2 of 2)

Additional Page Elements

Add Competencies from Job Opening Click to populate applicant competencies based on the current job code to which the applicant is applying. If you use position management, the system also displays any competencies assigned to the applicant's position.

Evaluation Details

Evaluation ID You can enter an evaluation ID manually or have the system assign one for you. The system assigns evaluation IDs in sequence.

You should either consistently assign IDs manually, according to a planned system, or you should consistently have the system assign them.

Evaluation Type Select an evaluation type.

Note. If you are not using 360-degree feedback or will not have multiple evaluations for an employee, use the *Approved/Official* evaluation type. Remember that there can be only one Approved evaluation type.

Review Date Enter the date the review took place.

Review Active Select if this is a current evaluation. The system considers only active evaluations when performing inquiries, such as a role match or competency search.

Reviewer ID If the reviewer is an employee, select the employee ID. If the reviewer is not an employee, leave this field blank and complete the Reviewer Name field instead.

This field is not available if you have selected an evaluation type of *Approved/Official* or *Self*.

Description Enter a description.

Review is Approved Select if the reviewer is approved. If you have selected an evaluation type of *Approved/Official,* this check box is not available for entry.

Evaluate Competencies

Competency Select a competency.

Proficiency Select a proficiency level.

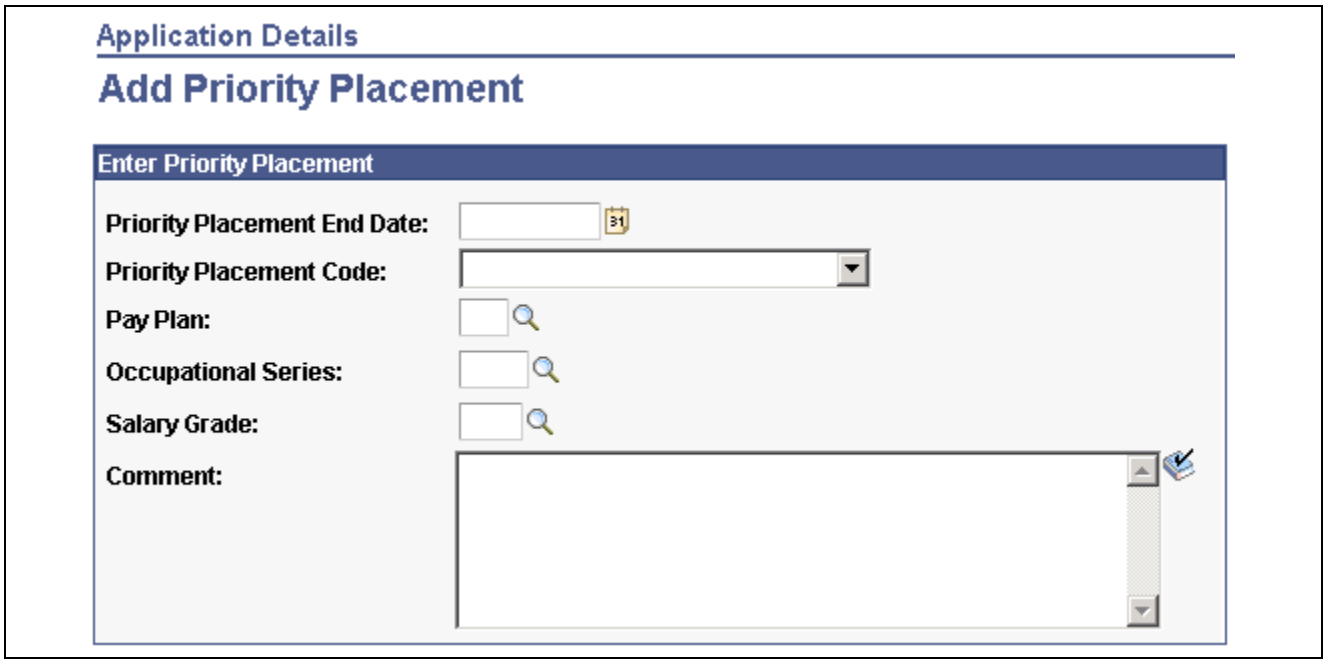
Interest Level Indicate the employee's interest in developing the selected competency.

Verification Details

Use this group box to view the competencies that you assigned to the employee.

(USF) Entering Priority Placement Information

Access the Application Details - Add Priority Placement page.



Application Details - Add Priority Placement page

Enter Priority Placement

Use this group box to assign a priority placement code and other information to an applicant. Depending on individual circumstances, applicants may be entitled to automatic priority consideration for jobs meeting certain criteria. This applies whether they apply for those jobs or not. Special consideration entitlement is extended to an applicant as a result of involuntarily being displaced. This action is usually the result of a reduction-in-force, or an involuntary position change action that entitles the applicant to a period of grade retention.

Priority Placement End Date Enter the date when priority placement considerations expire.

Priority Placement Code Select a priority placement code. Define priority placement codes in the Priority Placement page.

Pay Plan, Occupational Series, and **Salary Grade** Select the values associated with the priority considerations being taken.

Comment Enter comments. The comments that you enter appear only on this page.

Entering References

This section provides an overview of references and discusses how to:

- Request references.
- Enter references.

Understanding References

Enter references for an applicant on the Add New Applicant - Verification page. After you enter references for an applicant, you can use the Manage Applicant - Applicant Data: Verification page to update the information.

See Also

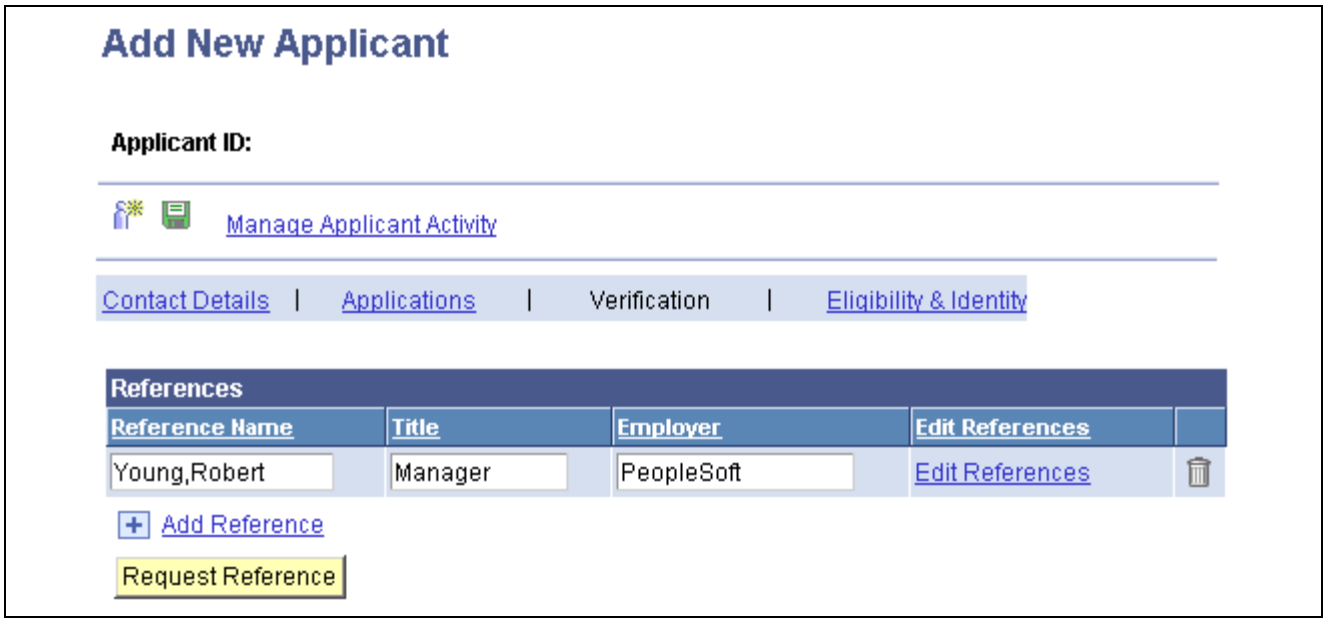
Chapter 17, "Managing Applicants," Managing References, page 348

Pages Used to Enter References

Page Name	Object Name	Navigation	Usage
Add New Applicant - Verification	HRS_ADD_APPLICANT	Recruiting, Add New Applicant, Add New Applicant Click the Verification link on the Add New Applicant page.	View references for an applicant and add and edit references.
Add Reference Details	HRS_APP_REF_SEC	• Click the Add Reference link on the Add New Applicant - Verification page. • Click the Add Reference link on the Adding Eligibility and Identity Information page.	Enter reference details for an applicant.
Edit Reference Details	HRS_APP_REF_SEC	• Click the Edit References link on the Add New Applicant - Verification page. • Click the Edit References link on the Adding Eligibility and Identity Information page.	Edit reference details for an applicant.

Requesting References

Access the Add New Applicant - Verification page.



Add New Applicant - Verification page

References

Use this group box to view the name of each reference, their title, and their employer.

Add Reference Click to access the Add Reference Details page, where you can enter new reference information for the applicant.

Edit References Click to access the Edit Reference Details page, where you can edit existing reference information for the applicant.

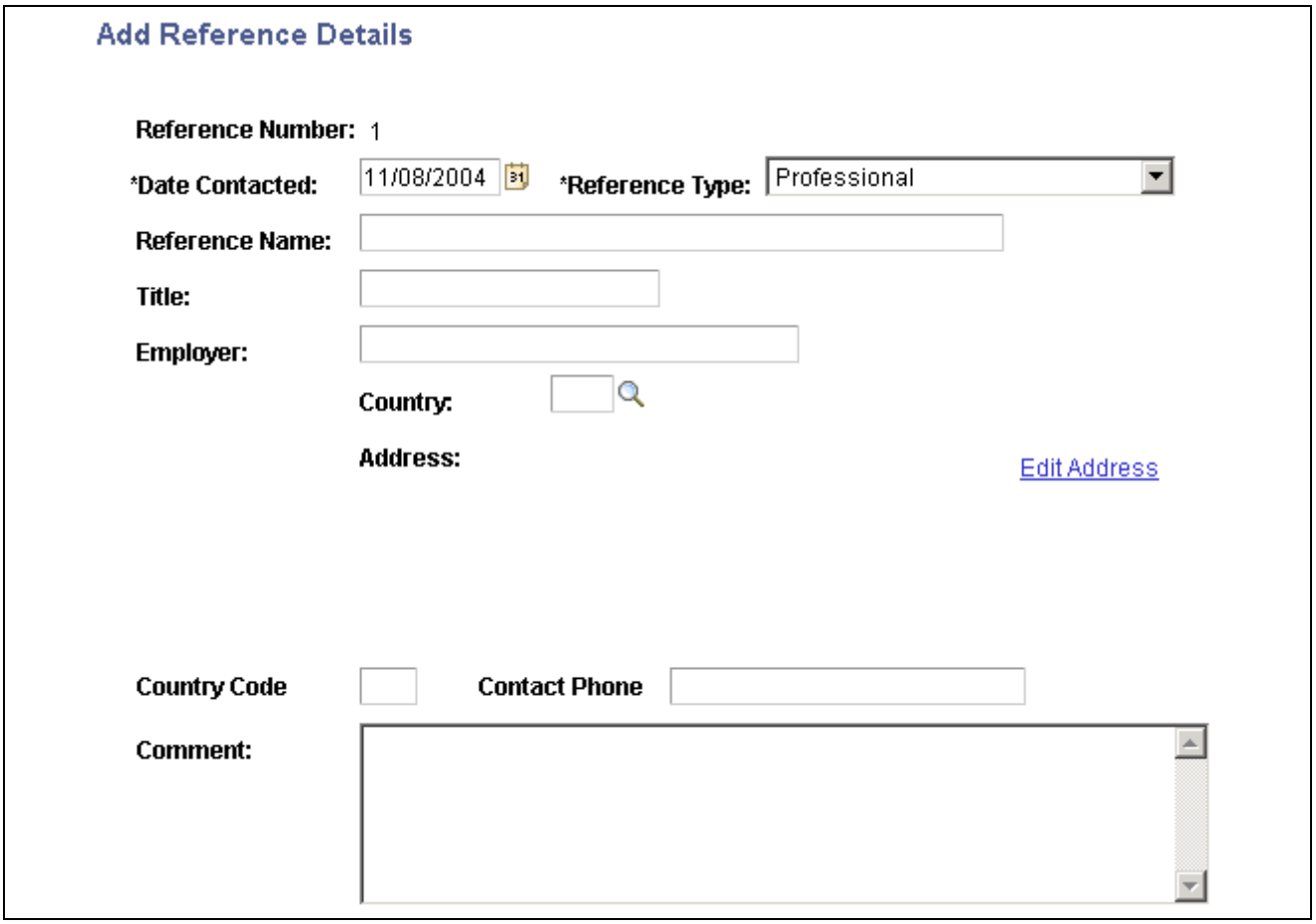
Request References Click to send a request for references email notification (HRS_UPDATE_REFERENCES) to the applicant. To request references, you must enter an email address for the applicant. If the applicant applied online by using PeopleSoft Enterprise Candidate Gateway, the system also posts a request for references notification in the Notifications grid on the Careers Home page.

See *PeopleSoft Enterprise Candidate Gateway 8.9 PeopleBook*, "Using Candidate Gateway".

Use the message catalog to modify the message.

Entering References

Access the Add Reference Details page or the Edit Reference Details page.



Add Reference Details page

Date Contacted Enter the date that you contacted the reference.

Reference Type Select the reference type: *Professional, Personal,* or *Both.*

Reference Name, Title, and **Employer** Enter the name of the person giving the reference, their title, and the name of their employer.

Country Select a country. The country that you select determines the fields that appear on the Edit Address page. You must select a country here for the Edit Address link to be active.

Address Displays the address of the reference that you enter on the Edit Address page.

Edit Address Click to access the Edit Address page, where you can enter address information for the reference. You must select a country in the Country field for this link to be active. The fields that appear on the Edit Address page vary depending on the country that you select in the Country field.

Country Code and **Contact Phone** Enter the country code and phone number of the reference.

Comment Enter a summary of the comments that the reference made about the applicant.

Entering Applicant Eligibility and Identity Information

This section provides an overview of eligibility and identity information and discusses how to:

- Add eligibility and identity information.
- Enter national ID information.
- Enter citizenship information.
- Enter visa permit information.
- Enter bank account information.

Understanding Eligibility and Identity Information

Enter eligibility and identify information as required by your organization on the Add New Applicant - Eligibility & Identity page. If the applicant is an internal applicant, the system populates the appropriate fields on this page with data from PeopleSoft Enterprise Human Resources tables after you select an employee ID in the EmplID field on the Add New Applicant - Contact Details page.

Some of this information might be required to comply with local country regulatory requirements:

- National identification information.
- Citizenship information.
- Visa and work permits.
- Bank accounts.
- Disability details.
- Accommodation requests and options.

After you add eligibility and identify information for an external applicant, you can use the Manage Applicant - Applicant Data: Eligibility & Identity page to update the applicant's information.

See Also

Chapter 17, "Managing Applicants," Editing Eligibility and Identity Information, page 349

Pages Used to Enter Applicant Eligibility and Identity Information

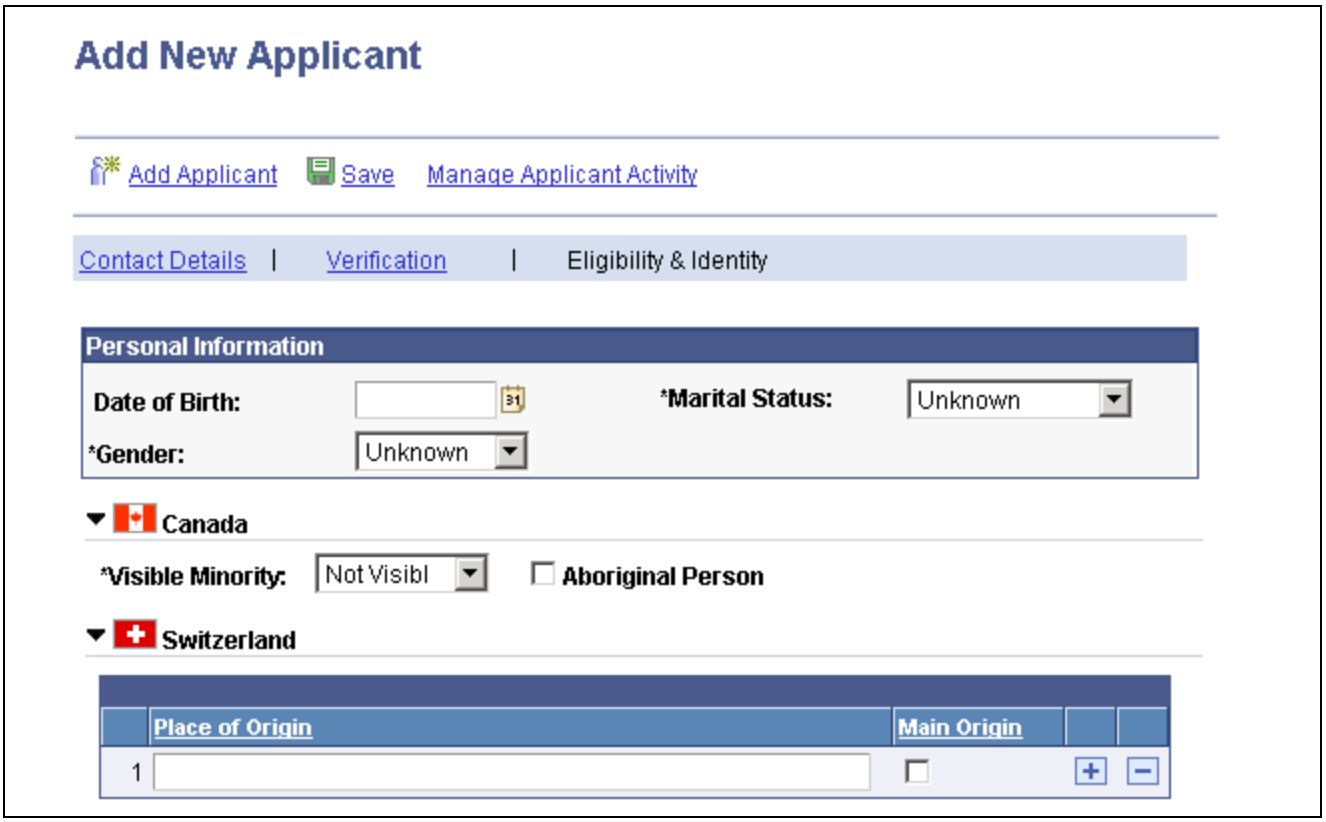
Page Name	Object Name	Navigation	Usage
Add New Applicant - Eligibility & Identity	HRS_ADD_APPLICANT	Recruiting, Add New Applicant, Add New Applicant Click the Eligibility & Identity link on the Add New Applicant page.	Enter eligibility and identity information for an applicant.

Page Name	Object Name	Navigation	Usage
National Id	HRS_APP_NID	• Click the Add National Identification link on the Add New Applicant - Eligibility & Identity page. • Click the Edit National Id link on the Add New Applicant - Eligibility & Identity page. • Click the Add National Identification link on the Manage Applicant - Applicant Data: Eligibility & Identity page. • Click the Edit National Id link on the Manage Applicant - Applicant Data: Eligibility & Identity page.	Enter national ID information for an applicant.
Citizenship	HRS_APP_CIT_PSP1	• Click the Add Citizenship link on the Add New Applicant - Eligibility & Identity page. • Click the Add Citizenship link on the Manage Applicant - Applicant Data: Eligibility & Identity page. • Click the Edit Citizenship Details link on the Add New Applicant - Eligibility & Identity page. • Click the Edit Citizenship Details link on the Manage Applicant - Applicant Data: Eligibility & Identity page.	Enter citizenship information for an applicant.

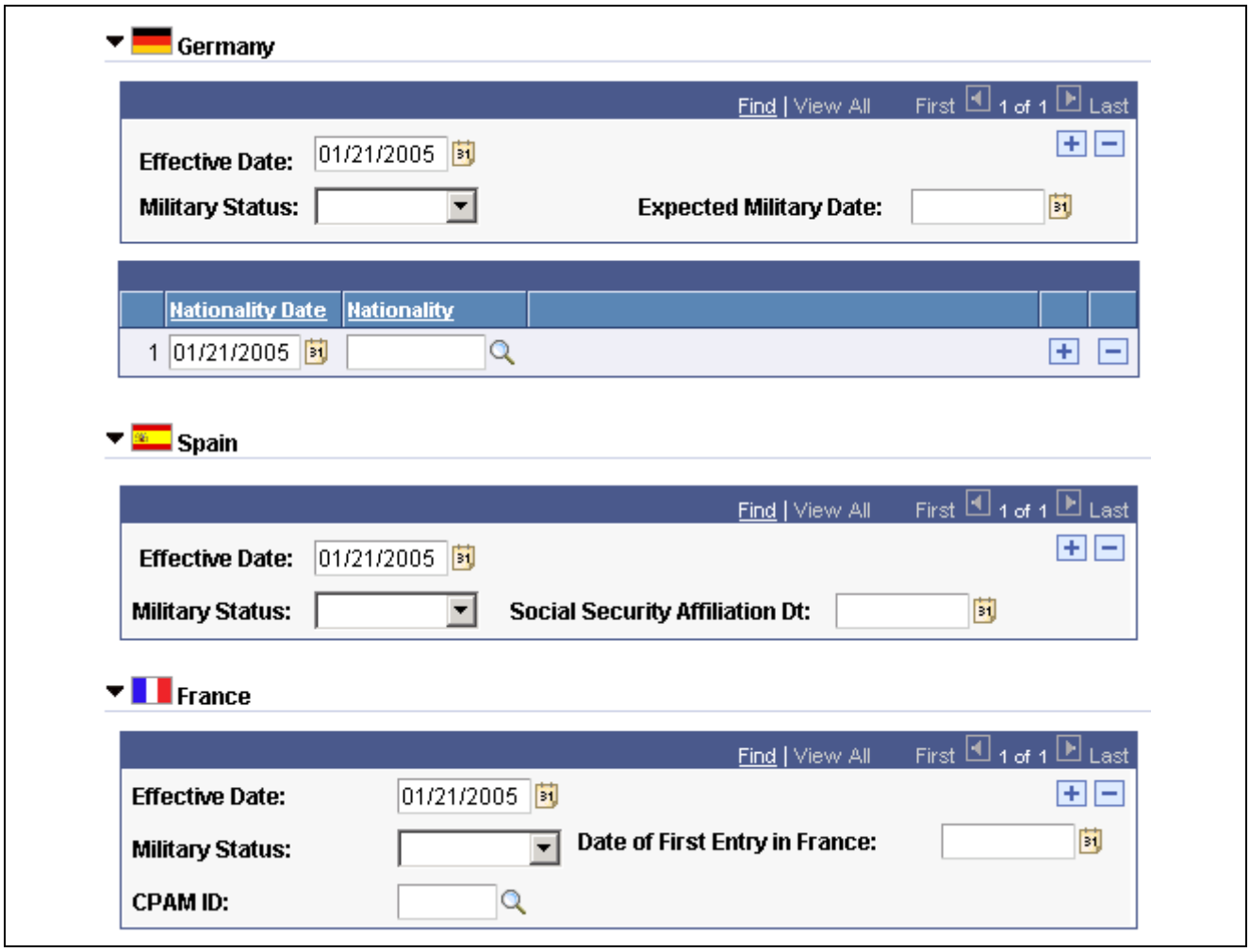
Page Name	Object Name	Navigation	Usage
Visa Permit Details	HRS_APP_VSA_PMT1	• Click the Add Visa Permit link on the Add New Applicant - Eligibility & Identity page. • Click the Add Visa Permit link on the Manage Applicant - Applicant Data: Eligibility & Identity page. • Click the Edit Visa Permit Details link on the Add New Applicant - Eligibility & Identity page. • Click the Edit Visa Permit Details link on the Manage Applicant - Applicant Data: Eligibility & Identity page.	Enter visa permit information for an applicant.
Bank Account	HRS_APP_BANKACCT	• Click the Add Bank Account link on the Add New Applicant - Eligibility & Identity page. • Click the Edit Bank Account link on the Add New Applicant - Eligibility & Identity page. • Click the Add Bank Account link on the Manage Applicant - Applicant Data: Eligibility & Identity page. • Click the Edit Bank Account link on the Manage Applicant - Applicant Data: Eligibility & Identity page.	Enter bank account information for an applicant.

Adding Eligibility and Identity Information

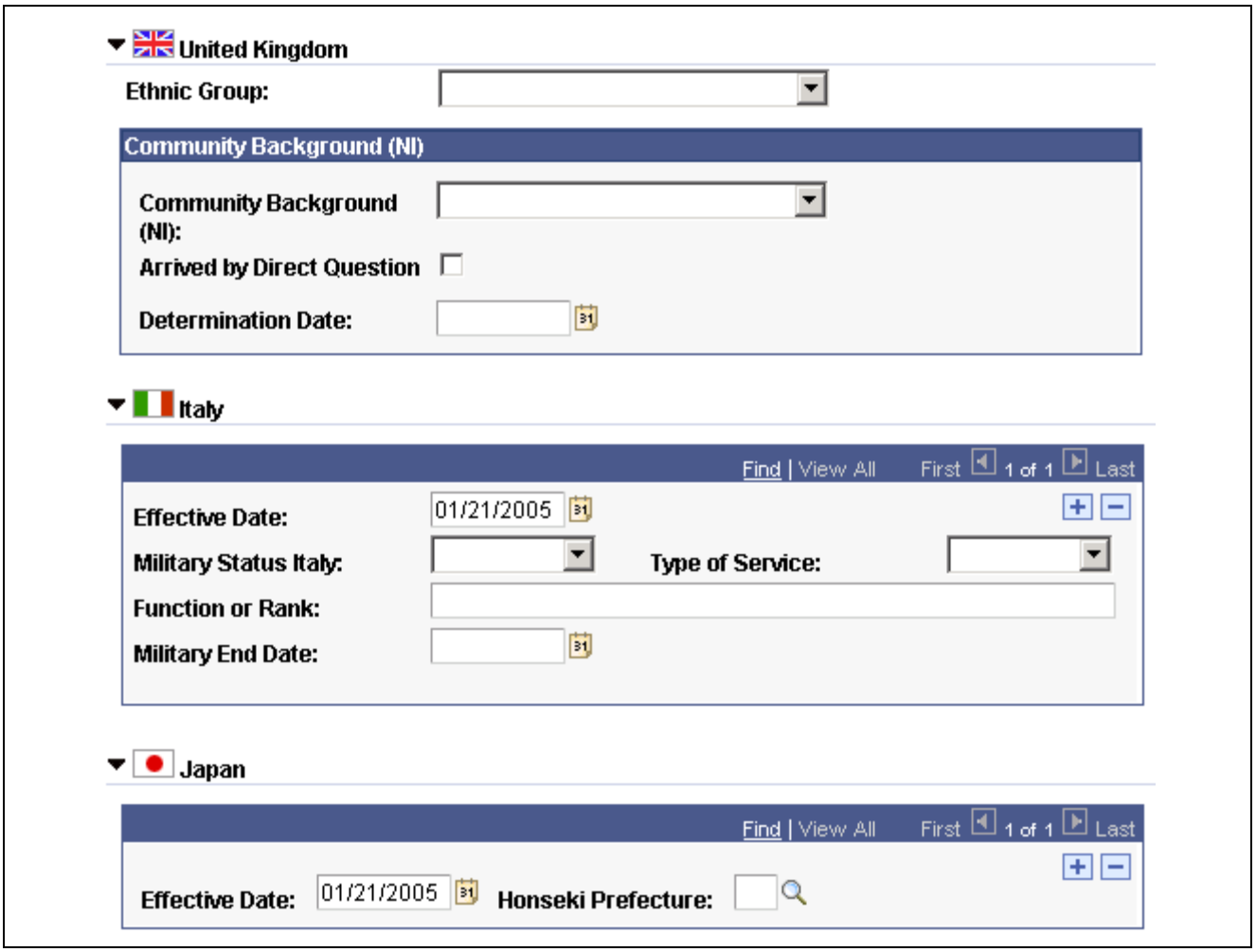
Access the Add New Applicant - Eligibility & Identity page.



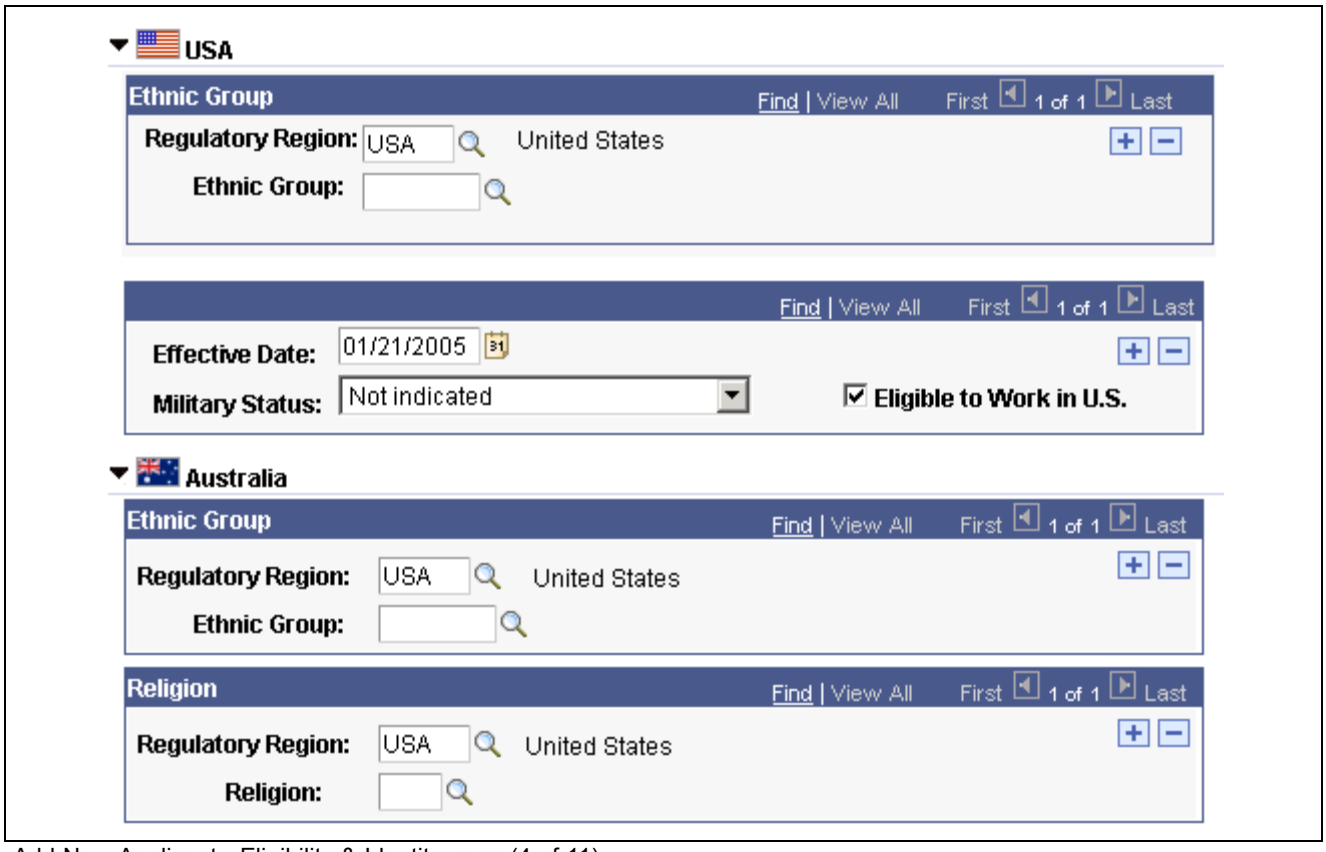
Add New Applicant - Eligibility & Identity page (1 of 11)



Add New Applicant - Eligibility & Identity page (2 of 11)



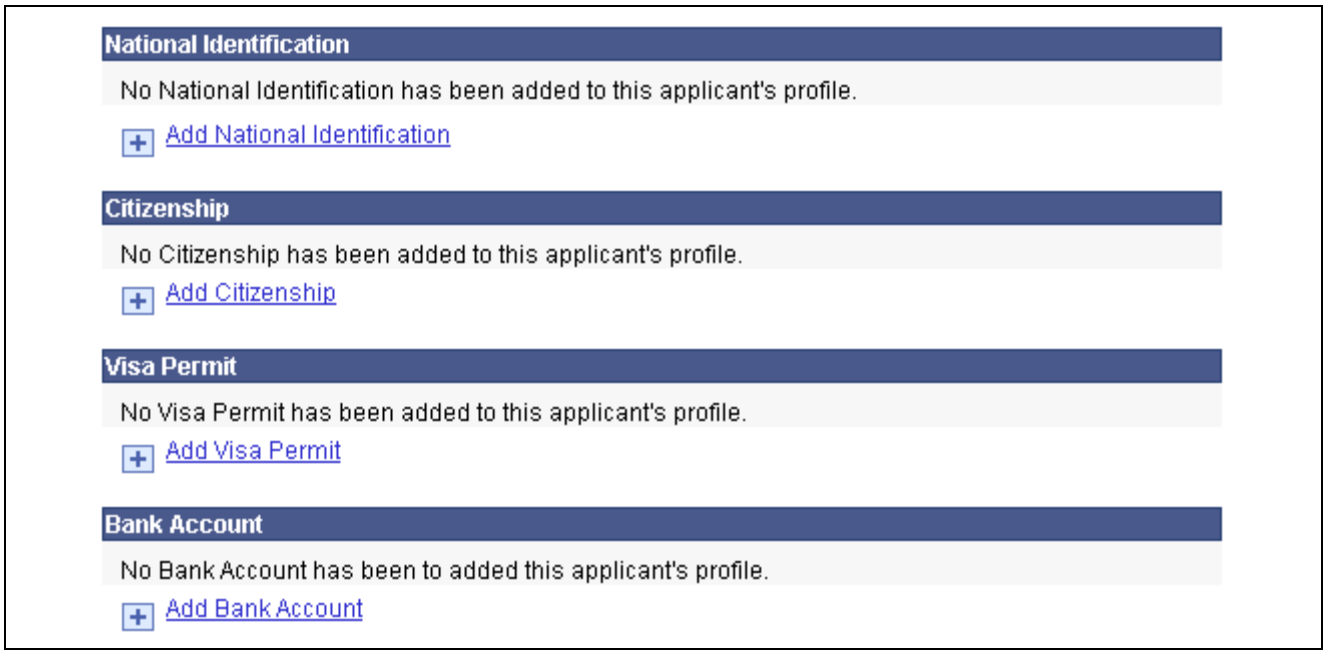
Add New Applicant - Eligibility & Identity page (3 of 11)



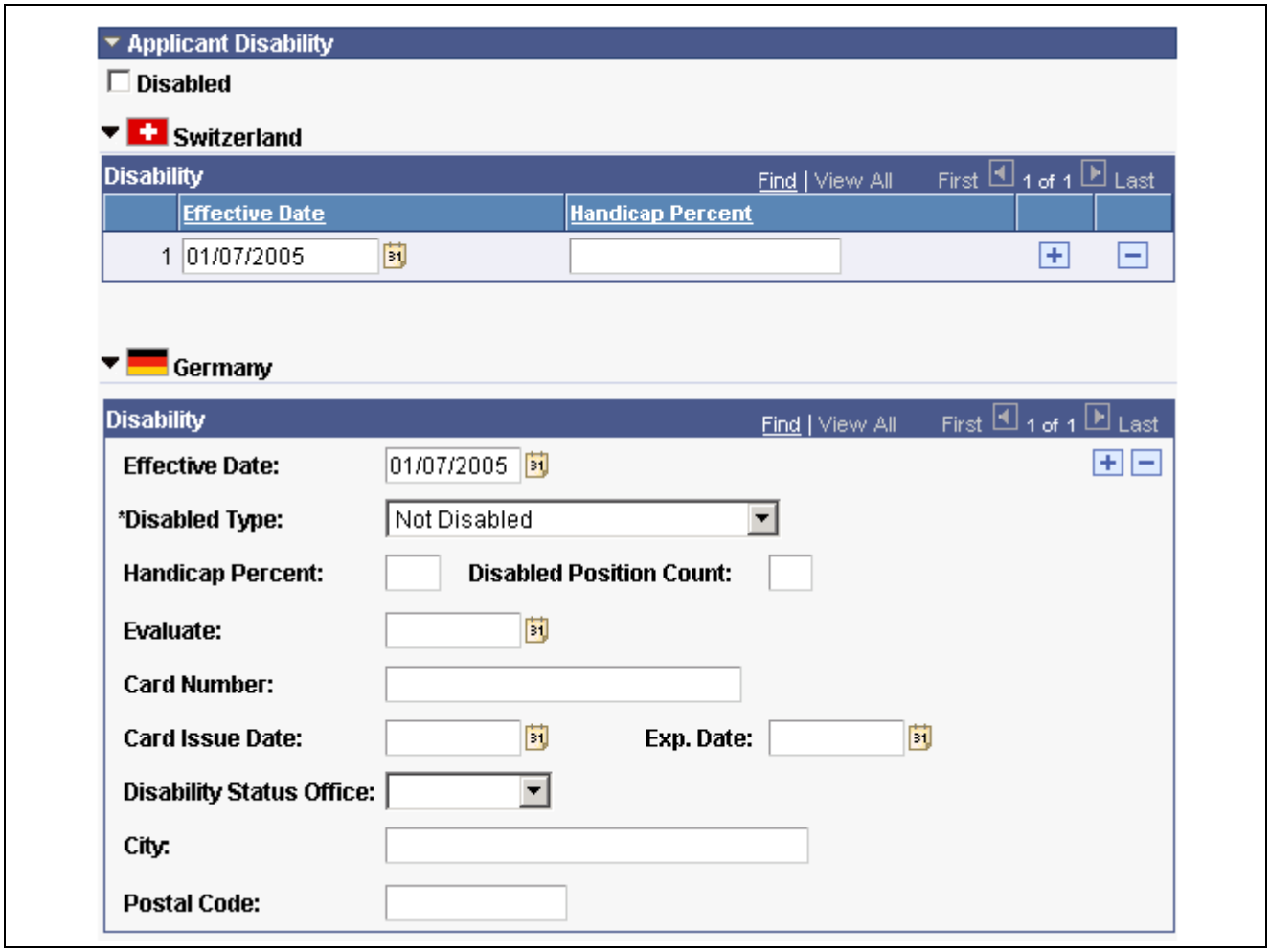
Add New Applicant - Eligibility & Identity page (4 of 11)



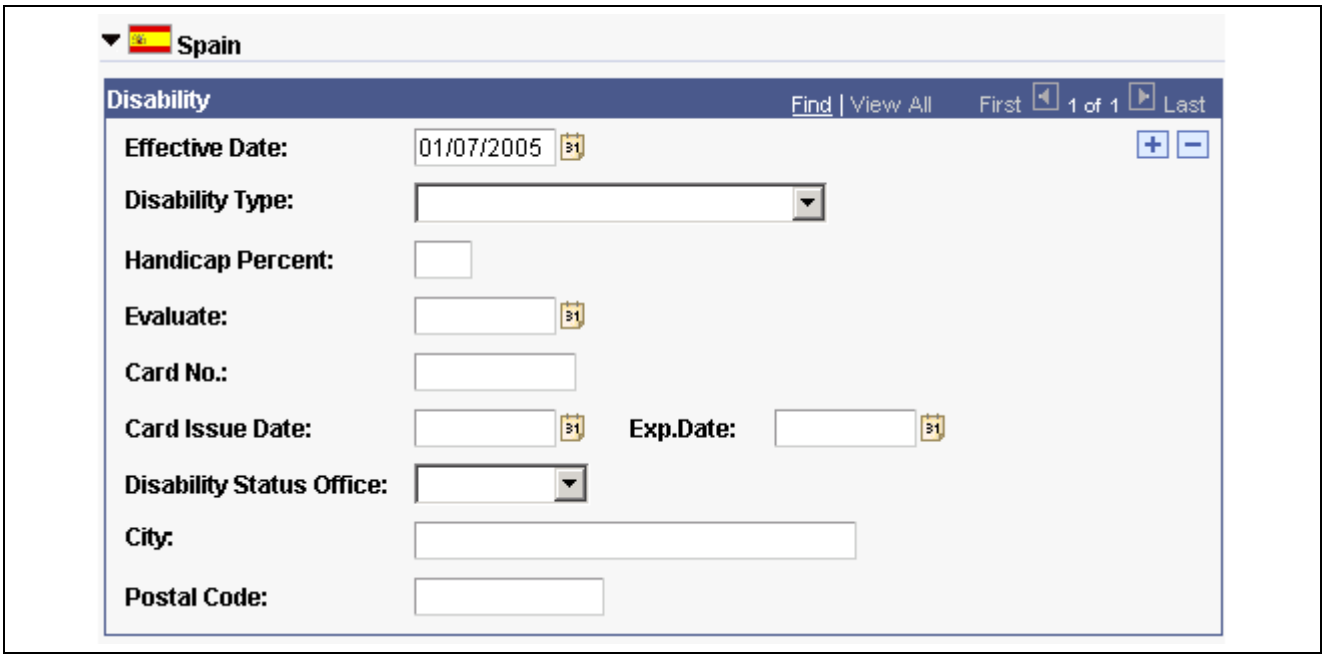
Add New Applicant - Eligibility & Identity page (5 of 11)



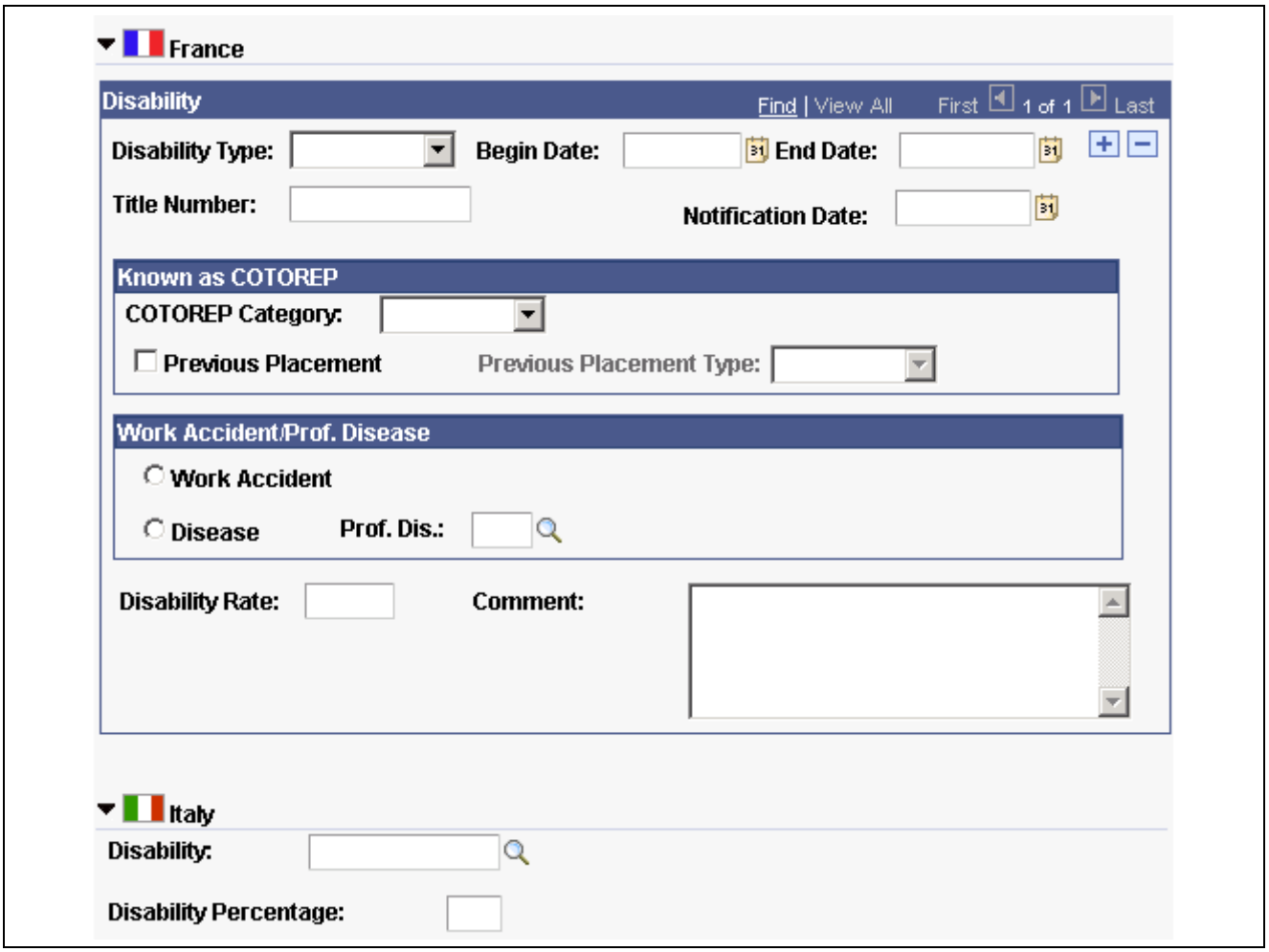
Add New Applicant - Eligibility & Identity page (6 of 11)



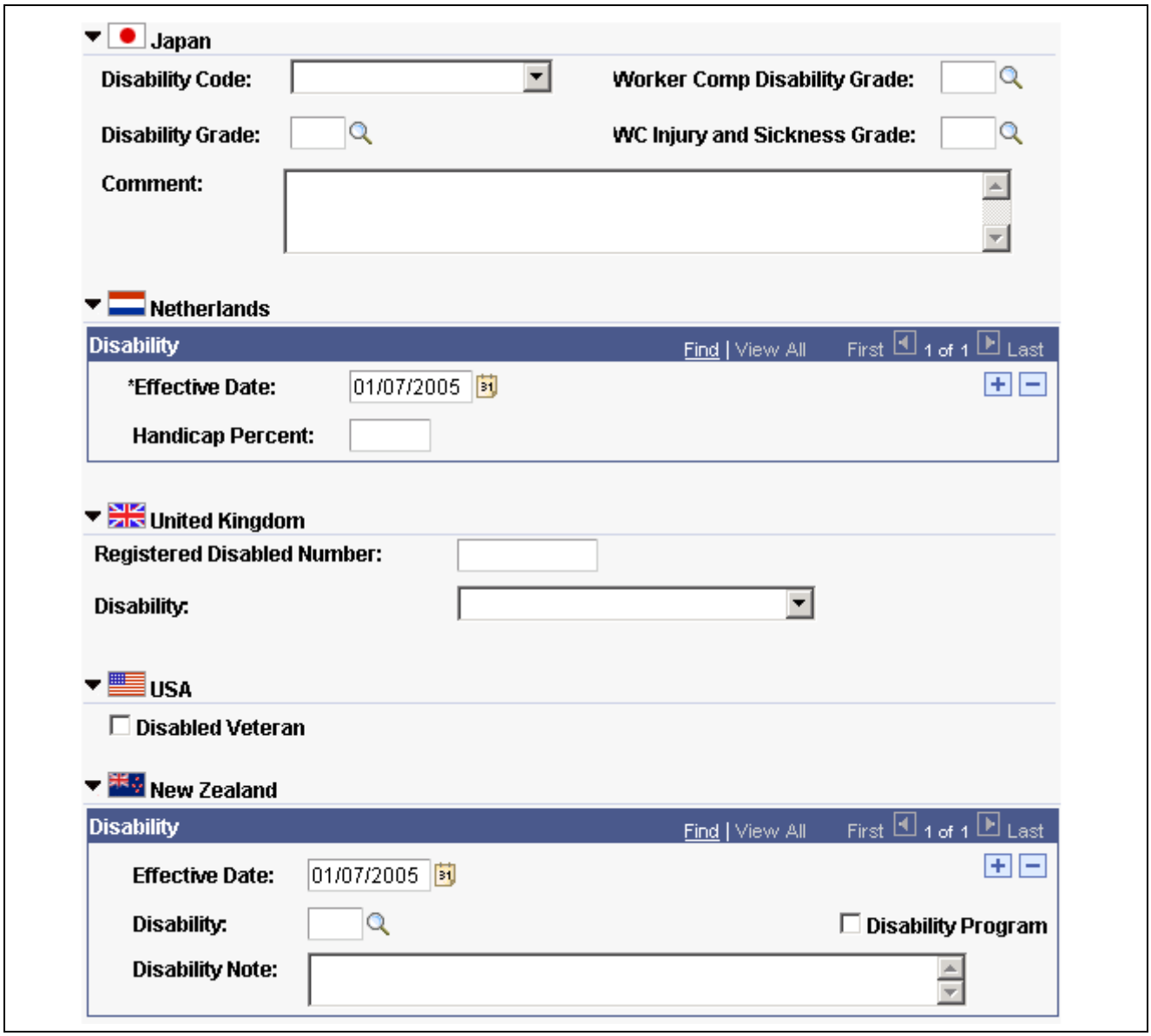
Add New Applicant - Eligibility & Identity page (7 of 11)



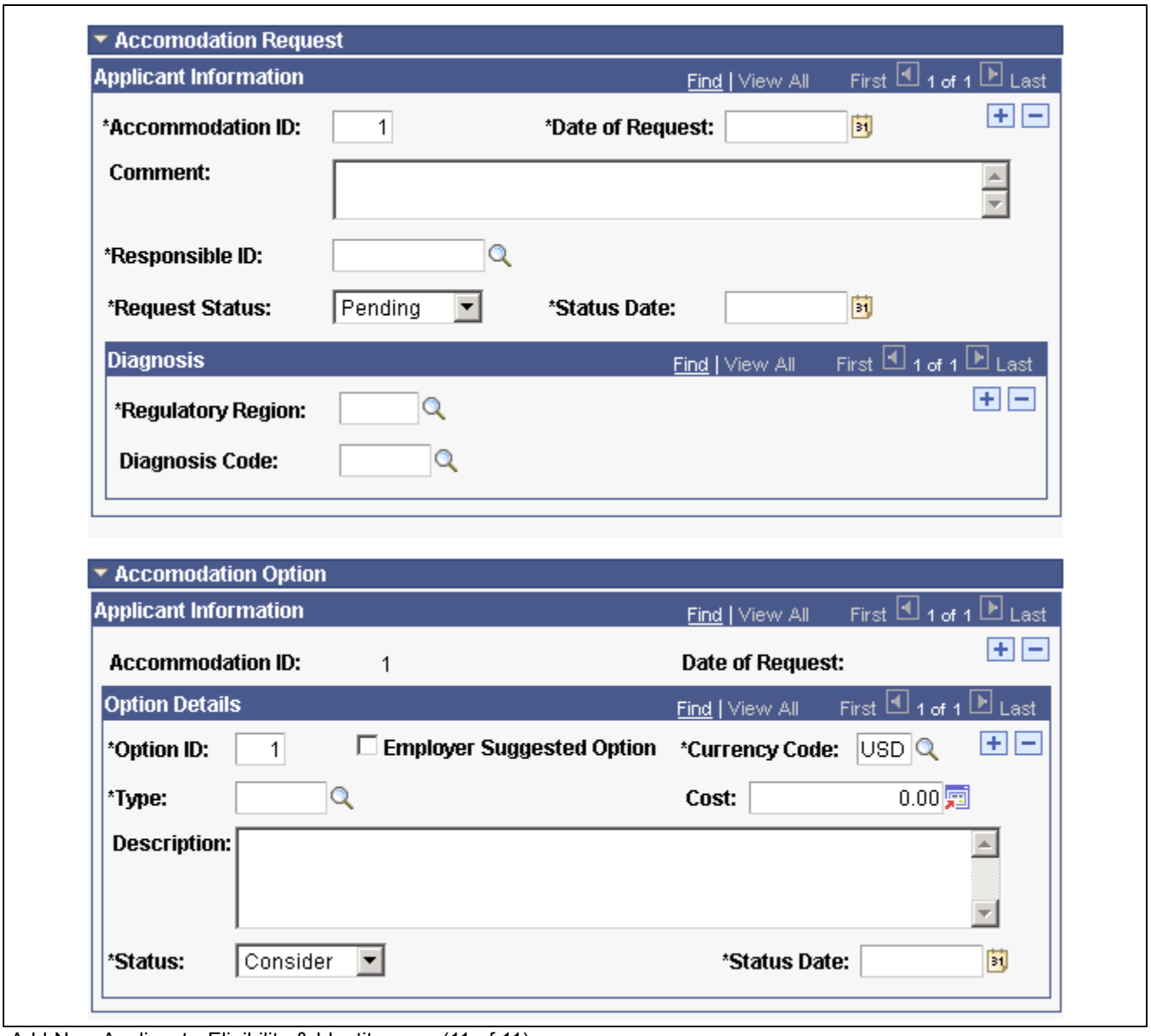
Add New Applicant - Eligibility & Identity page (8 of 11)



Add New Applicant - Eligibility & Identity page (9 of 11)



Add New Applicant - Eligibility & Identity page (10 of 11)



Add New Applicant - Eligibility & Identity page (11 of 11)

Personal Information

Use this group box to enter country-specific personal information for the applicant. The fields under each flag are the same as those on the Regional page in PeopleSoft Enterprise Human Resources Administer Workforce.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Adding a Person in PeopleSoft Human Resources," Entering Country-Specific Person Data.

National Identification

Add National Identification and **Edit National Id** — Click to access the National Id page, where you can enter new or edit existing national ID information for the applicant.

Citizenship

Add Citizenship and **Edit Citizenship Details** — Click to access the Citizenship page, where you can enter new or edit existing citizenship information for the applicant.

Visa Permit

Add Visa Permit and **Edit Visa Permit Details** — Click to access the Visa Permit Details page, where you can enter new or edit existing visa permit details.

Bank Accounts

Add Bank Account and **Edit Bank Account** — Click to access the Bank Account page, where you can enter new or edit existing bank account information for the applicant.

Applicant Disability

Use this group box to enter country-specific disability information. The fields in this group box are the same as those on the Disability page in PeopleSoft Enterprise Human Resources Administer Workforce.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Entering Additional Data in Human Resources Records," Entering Disability Information.

Accommodation Request

Use this group box to enter accommodation requests for an applicant with a disability. The fields in this group box are the same as those on the Accommodation Request page in PeopleSoft Enterprise Human Resources Meet Regulatory Requirements.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Meet Regulatory Requirements*, "(GBR, USA, and USF) Meeting Disability Regulatory Requirements," Entering Accommodation Requests.

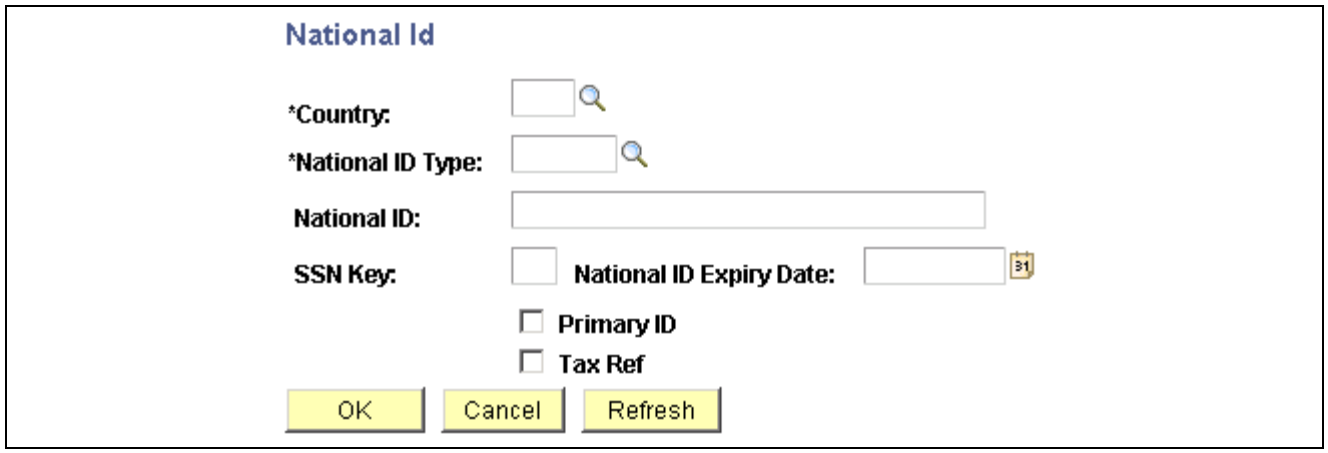
Accommodation Options

Use this group box to enter accommodation options for an applicant with a disability. The fields in this group box are the same as those on the Accommodation Option page in PeopleSoft Enterprise Human Resources Meet Regulatory Requirements.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Meet Regulatory Requirements*, "(GBR, USA, and USF) Meeting Disability Regulatory Requirements," Entering Accommodation Options.

Entering National ID Information

Access the National Id page.



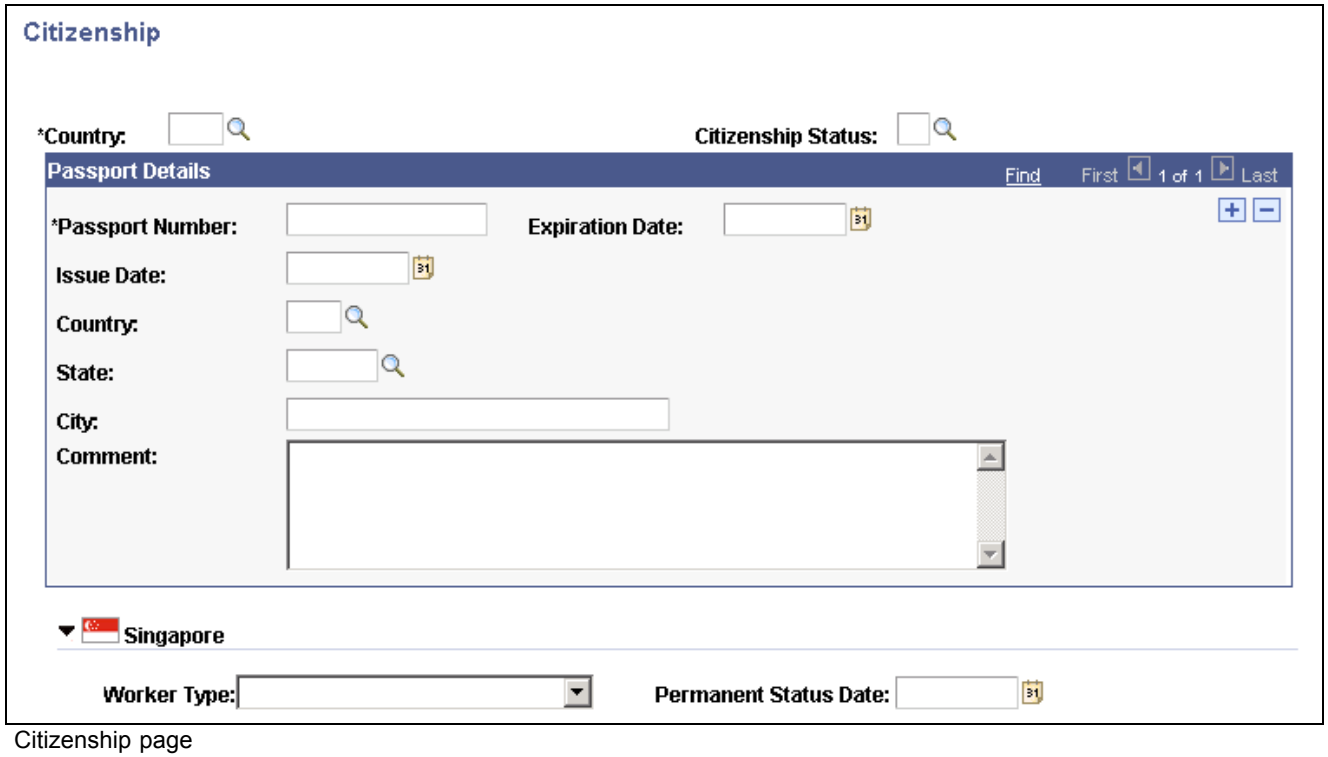
National Id page

The fields on this page are the same as the fields in the National ID scroll area on the Biographical Details page in PeopleSoft Enterprise Human Resources Administer Workforce.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Adding a Person in PeopleSoft Human Resources," Entering Name and Biographical Data.

Entering Citizenship Information

Access the Add Citizenship page.



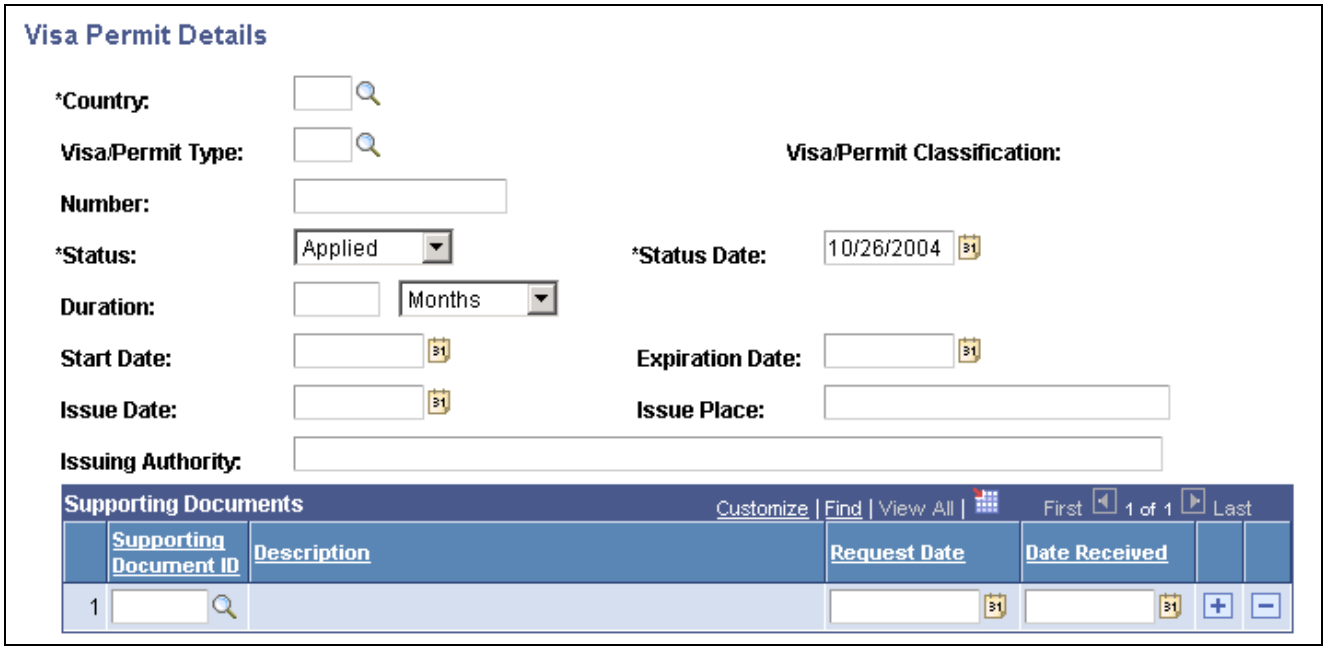
Citizenship page

The fields on this page are the same as the fields on the Citizenship/Passport page in PeopleSoft Enterprise Human Resources Administer Workforce.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Entering Additional Data in Human Resources Records," Tracking Employee Passport and Citizenship Information.

Entering Visa Permit Information

Access the Visa Permit Details page.



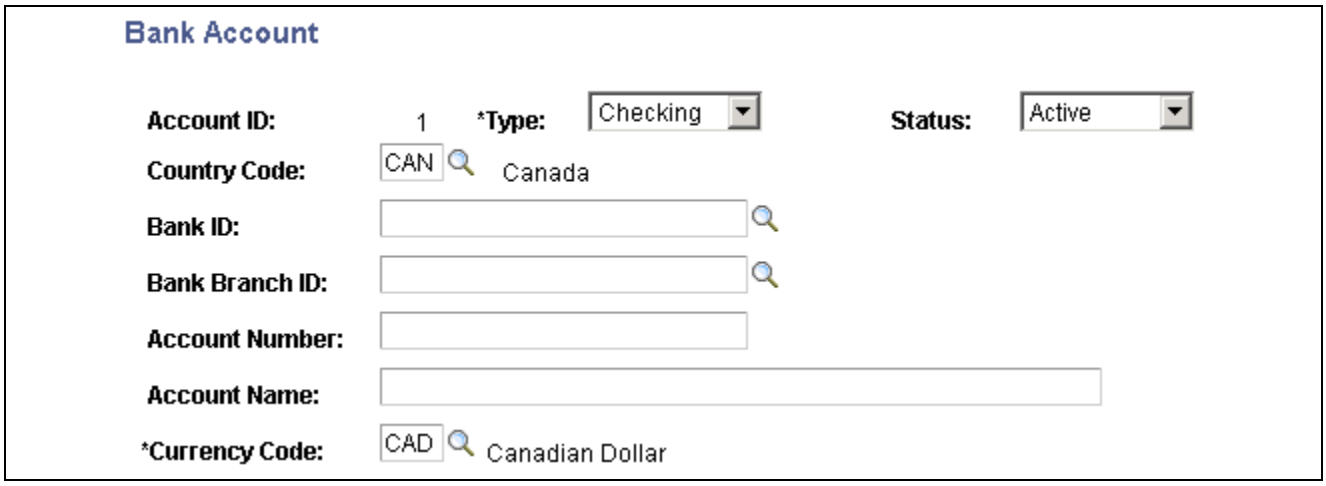
Visa Permit Details page

The fields on this page are the same as the fields on the Visa/Permit Data page in PeopleSoft Enterprise Human Resources Administer Workforce.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Entering Additional Data in Human Resources Records," Entering an Employee's Visa or Permit Information.

Entering Bank Account Information

Access the Bank Account page.



Bank Account page

The fields on this page are the same as the fields on the Maintain Bank Accounts page in PeopleSoft Enterprise Human Resources Administer Workforce.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Entering Additional Data in Human Resources Records," Recording Employee Bank Account Information.

CHAPTER 10

Searching for Applicants, Job Openings, and Job Postings

This chapter discusses how to:

- Search for applicants.
- Search for job openings.
- Search for external job postings.
- Run the Job Search Agent.

Searching for Applicants

This section provides overviews of applicant searches, saved searches, automatch searches, and the applicant index, lists prerequisites, and discusses how to:

- Define applicant and application and resume searches.
- Define advanced keyword searches.
- Save applicant search criteria.
- Build the applicant index.
- Run Automatch searches.

Understanding Applicant Searches

Finding qualified applicants for your job openings is a major task for your recruiting staff. To search for applicants, you use the Find Applicants page.

On the Find Applicants page, you can:

- Run applicant searches that looks for specific records within your existing applicant data.
- Run application and resume searches that uses a search engine to find keywords in the applicants resume text or attached resume document within our existing applicant data.
- Search the internet for applicants using AIRS SearchStation.

  AIRS SearchStation is a web-based tool that searches various locations on the internet for applicant information, including job boards, resume banks, and newsgroups.
- Save searches.

Applicant Search

Applicant Search enables you to search for applicants in the applicant database based on specific record fields.

Application and Resume Search

Application and Resume Search enables you to search for applicants whose resume text or attached resume match specific words related to job requirements.

Search Internet

PeopleSoft software provides the ability to search the internet for applications in partnership with AIRS SearchStation. Linking your PeopleSoft system to AIRS SearchStation enables your recruiting staff to search for external applicants with the right experiences and skills.

AIRS SearchStation is a web-based tool that searches various locations on the internet for applicant information, including job boards, resume banks, and newsgroups. To access AIRS SearchStation:

1. Select the AIRS link on the Find Applicants page.
2. On the AIRS SearchStation website, enter your search criteria and start the search.
3. Check the applicants returned by AIRS and identify potential candidates.

   You can save details of applicants that you plan to contact using the AIRS SearchStation options Save to Folder and Save to Disk.
4. Contact the applicants identified by the search to find out if they are interested in applying to your organization.
5. Load the applicants' details into your PeopleSoft database as follows:
   a. Navigate to the AIRS SearchStation website and display the applicant information.
   b. Click the Save to Talent Acquisition Manager link.

      The AIRS system displays the default email address previously set up. Accept the default address.

      AIRS SearchStation emails the selected applicants' resumes to your resume processing account. The resume processing extracts applicant data from the resume and inserts it into the applicant data tables.

Understanding Saved Searches

Searches can be saved two ways:

- As a standard search that can be run at anytime.
- As an automatch search that can be automatically run at regular scheduled times using the Run Automatch Search (HRS_AM) process.

Saved searches can be designated as either public or private. Public searches can be used by anyone. Only administrators and the creator of the search can update or delete public search criteria. Private searches are only available to the person who created the search.

To review a saved search and the results from the search, use the Saved Searches page.

The Saved Searches page displays a list standard and automatch searches. The displayed searches are the public searches available to anyone or the user's private searches. You can view the results of the search or run the search again. If you run the search again, the system replaces the old results with the new search results.

Understanding Automatch Searches

The Automatch process searches the applicant database for applicants that match the criteria. When the system finds an applicant that matches the criteria, a workflow sends emails to the recruiters responsible for the requisitions. Recruiters can view the results of the Automatch search and link applicants to the job requisitions.

Understanding the Applicant Index

Application and Resume Search and Advanced Keyword search are only as current as the index used to access the applicant database. Since applicants are continually being added to the data, you must frequently rebuild the applicant index using the Build Applicant Index page.

Prerequisites

To search for applicants using Application and Resume Search or Advanced Keyword Search, you must first run Build Applicant Index.

To search the internet for applicants you must set up AIRS SearchStation as a supplier.

See Chapter 5, "Setting Up Third Party Integrations," page 75.

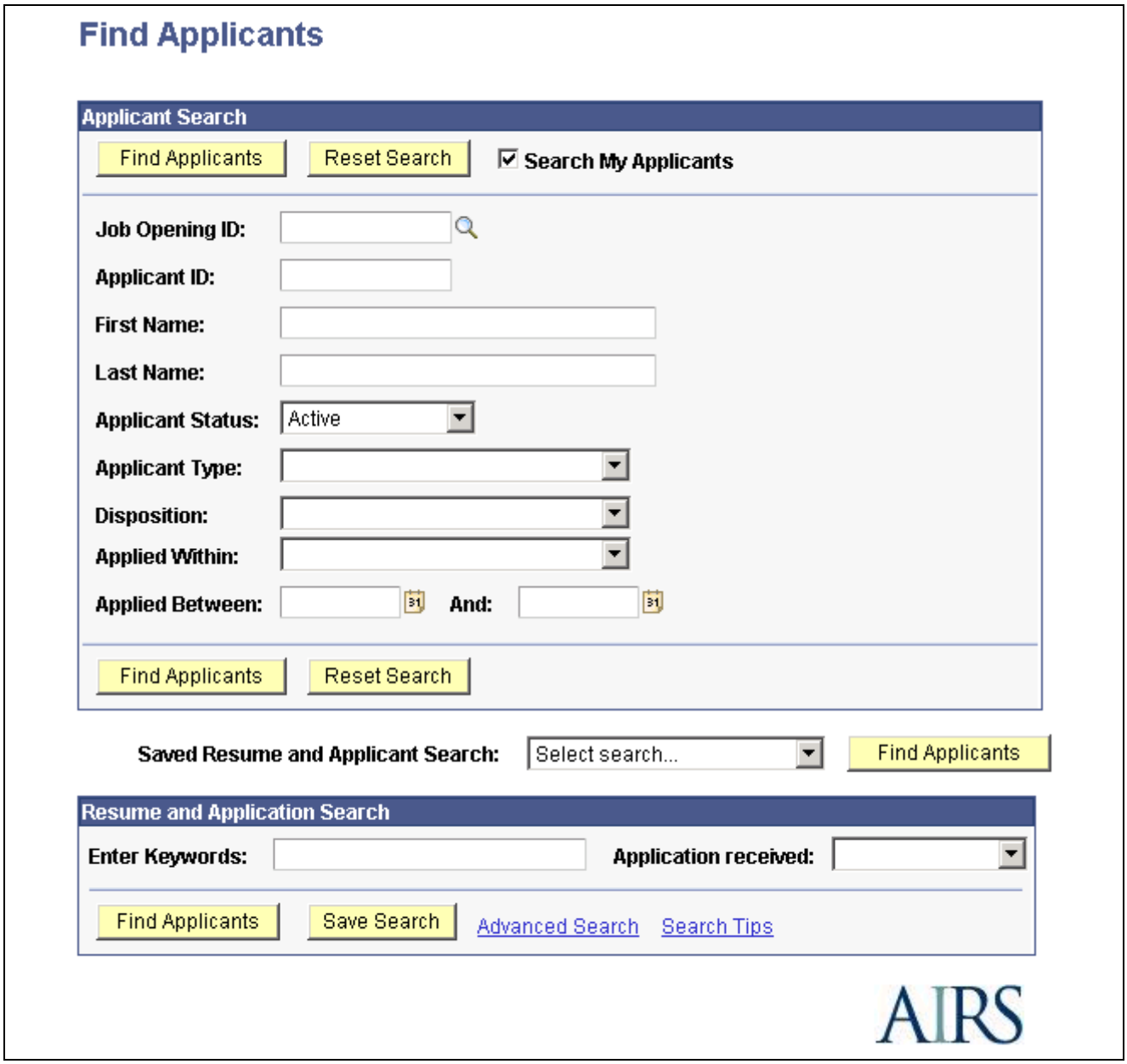
See Chapter 10, "Searching for Applicants, Job Openings, and Job Postings," Understanding the Applicant Index, page 229.

Pages Used to Search for Applicants

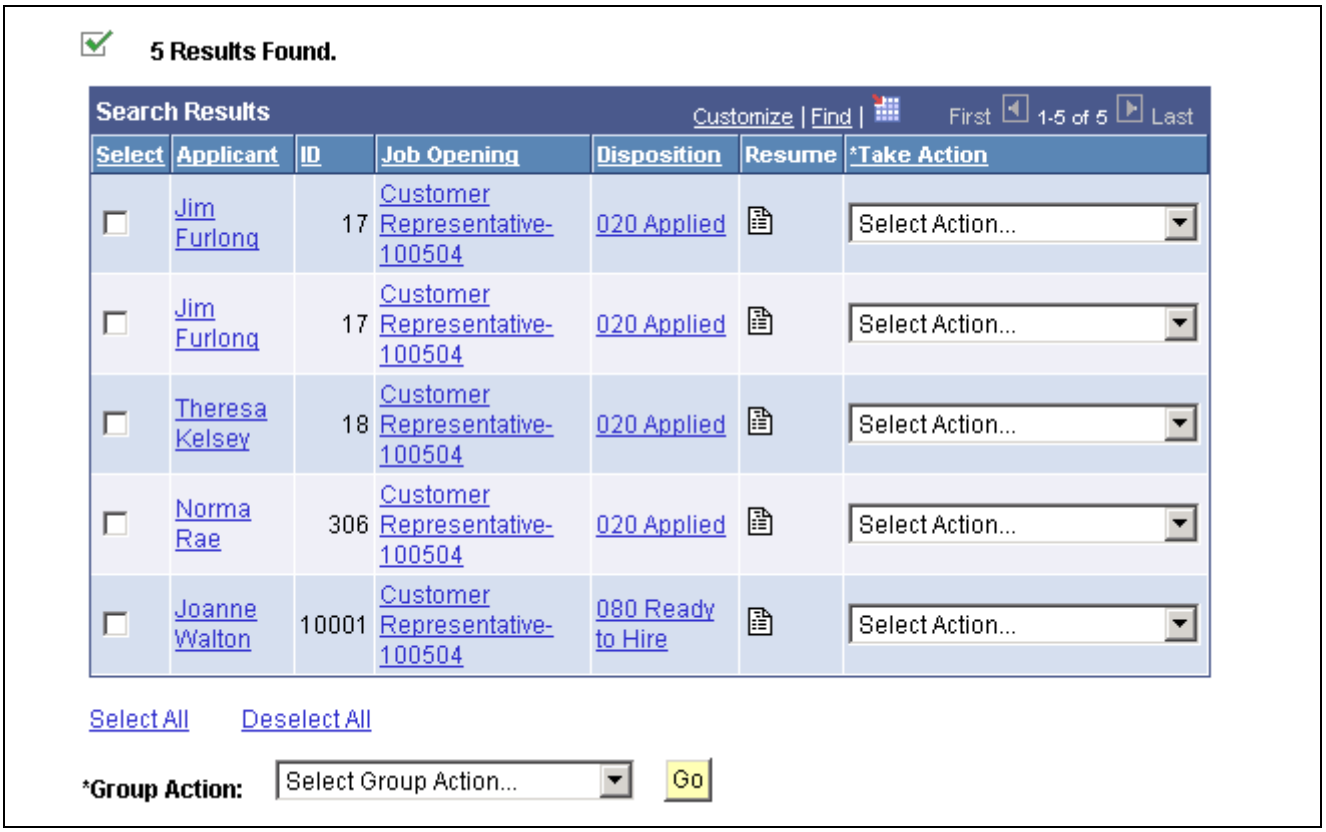
Page Name	Object Name	Navigation	Usage
Find Applicants	HRS_REC_SCHAPP	Recruiting, Find Applicants, Find Applicants	Define Applicant Search and Application and Resume Search criteria. Click the AIRS link to search the internet for applicants.
Advanced Keyword Search	HRS_REC_SCHAPP	Click the Advanced Keyword Search link on the Find Applicants page.	Define advanced keyword searches.
Save Search	HRS_REC_SAV_SCH	Click the Save Search button on the Find Applicants page.	Save applicant search criteria.
Saved Searches	HRS_REC_SEARCHES	Recruiting, Saved Searches, Saved Searches	Review and run saved searches.
Build Applicant Index	HRS_SRCH_RUN_INDEX	Recruiting, Administration, Build Applicant Index	Build the applicant index.
Run Automatch Search Agent	HRS_RUN_AMH	Recruiting, Administration, Run Automatch Search, Run Automatch Search Agent	Runs searches that have been designated as automatch.

Defining Applicant and Application and Resume Searches

Access the Find Applicants page.



Find Applicants page (1 of 2)



Find Applicants page (2 of 2)

Use Saved Search Select a previously saved active search criteria. This list of available saved searches includes public searches, as well as private searches created by the user. Saved searches are displayed alphabetically with the user's private search first followed by the public searches.

Applicant Search

Complete the criteria for your search. The system compares the fields you entered against the applicants that are already in your applicant database.

Applicant and Resume Search

Enter any words or phases that you want the system to compare to applicants resume text or attached resume documents that are already in your applicant database.

Search For Enter the words or phrase that you want to search for in:

- The resume text field in applicant data.
- The resumes attached to the applicant's application.

Applicant Received Select the date range that defines which applications to include in the search. Valid options are:

- *Anytime*
- *Within Last Day*
- *Within Last Month*

- *Within Last Week*
- *Within Last Year*

Airs

Click to search the internet for applicants.

Search Results

Click to search the internet for applicants.

Name Click to display the Manage Applicant page.

ID Displays the applicant's identification number.

Job Opening Click to access the Job Opening page.

Status Click to access the Manage Applicant - Disposition Details page.

Resume Click to access the Manage Applicant - Applicant Resume page.

Select Action Select an action you want to take for the selected applicant. The system automatically executes the action and accesses the appropriate page. Actions are:

- *Add Applicant to Saved List.*
- *Add Applicant to New List.*
- *Add Note:* Accesses the Add Note page.
- *Create Interview Evaluation.*
- *Forward Applicant.*
- *Link Applicant to Job.*
- *Make Active.*
- *Make Inactive.*
- *Prepare Job Offer.*
- *Prepare for Hire.*
- *Reject Applicant.*
- *Route Applicant:* Accesses the Manage Applicant - Disposition Details page.
- *Schedule Interview.*
- *Send Correspondence:* Accesses the Send Correspondence page.

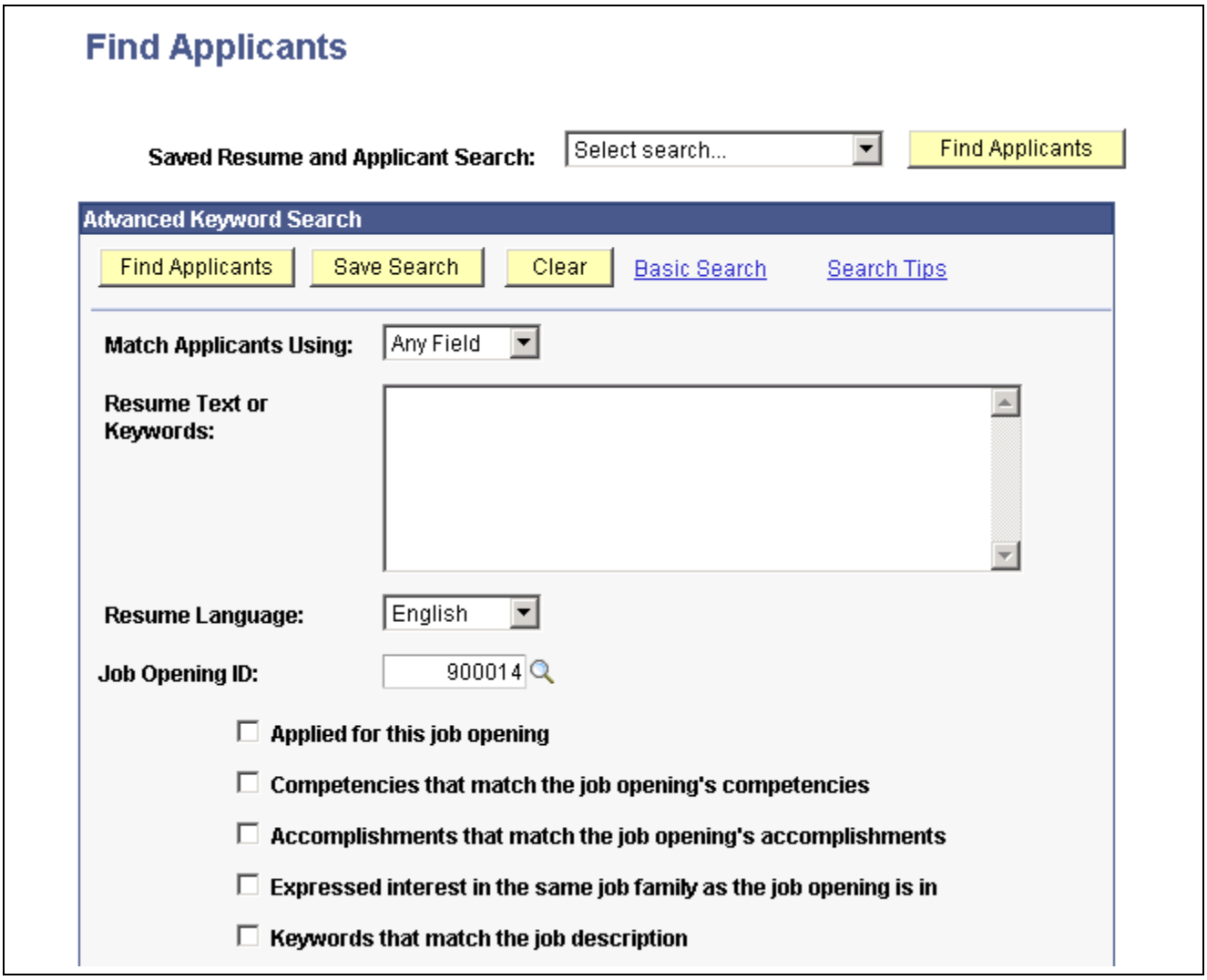
Select Group Action Select an action you want to make to the applicants that have the check box next to their name selected. Click the Go button to execute the action. Actions are:

- *Add Applicant to Saved List.*
- *Add Applicant to New List.*
- *Forward Applicant.*
- *Link to Job Opening.*

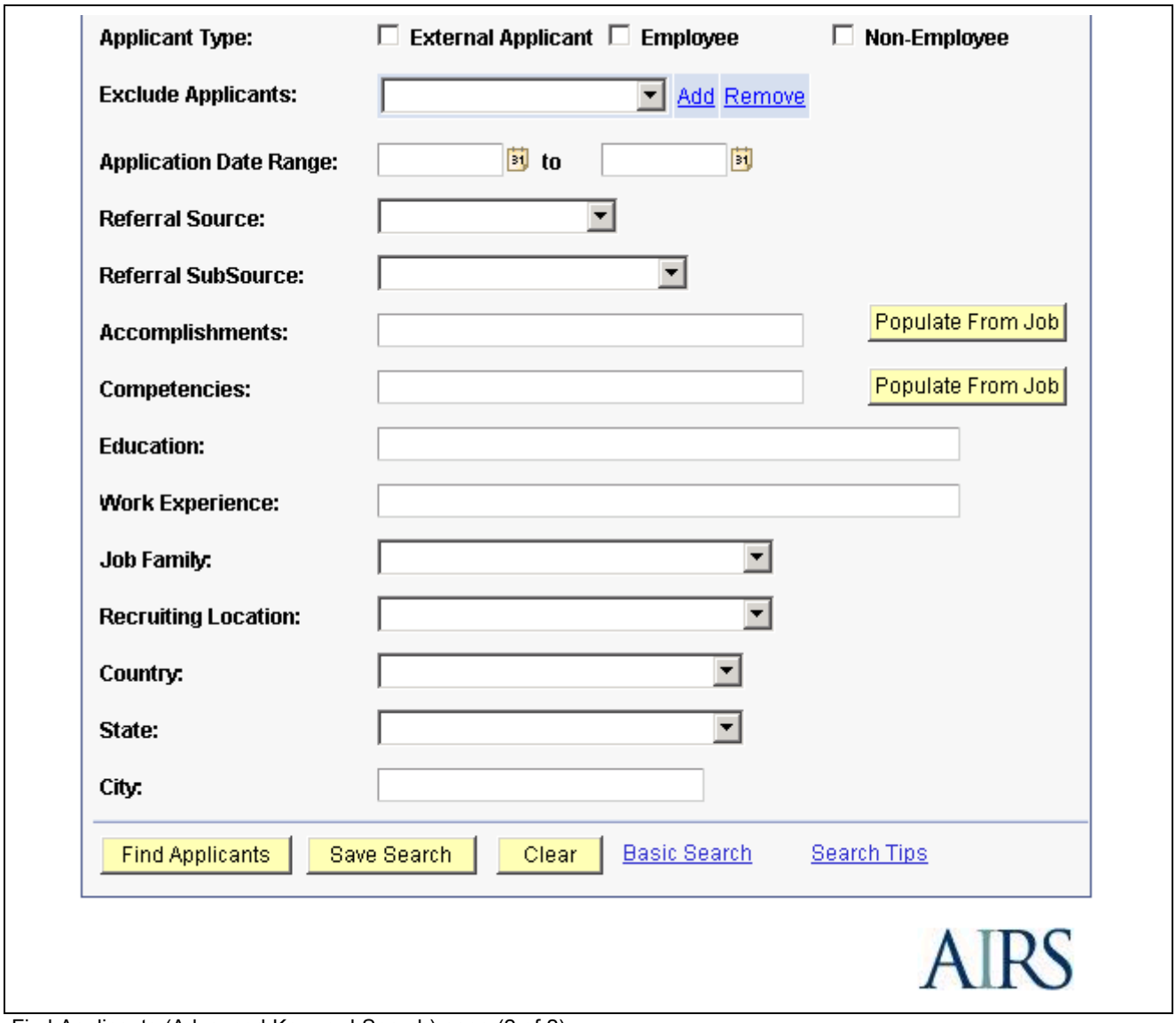
- *Make Active.*
- *Make Inactive.*
- *Reject Applicant.*
- *Route Applicant.*
- *Schedule Interview.*
- *Send Correspondence.*

Defining Advanced Keyword Searches

Access the Find Applicants page.



Find Applicants (Advanced Keyword Search) page (1 of 2)



Find Applicants (Advanced Keyword Search) page (2 of 2)

Use Saved Search Select a previously saved active search criteria. This list of available saved searches includes public Keyword and Advanced Keyword searches, as well as private searches created by the user. Saved searches are displayed alphabetically with the user's private search first followed by the public searches.

Advanced Keyword Search

Search for applicant who match Select the option that defines how much of the search criteria an applicant must match to include in the search. Options are:

- *All Fields*
- *Any Field*

Resume Text Enter the words or phrase that you want to search for in:

- The resume text field in applicant data.

- The resumes attached to the applicant's application.

Resume Language Select the resume language to include in the search.

Job Opening ID Enter or select a job opening ID.

Applied for this job opening This field appears if you entered a job opening ID. Select the check box if it is an option by which you want to search.

Competencies that match the job opening's competencies This field appears if you entered a job opening ID. Select the check box if it is an option by which you want to search.

Accomplishments that match the job opening's accomplishments This field appears if you entered a job opening ID. Select the check box if it is an option by which you want to search.

Expressed interest in the same job family as the job opening is in This field appears if you entered a job opening ID. Select the check box if it is an option by which you want to search.

Keywords that match the job description This field appears if you entered a job opening ID. Select the check box if it is an option by which you want to search.

Applicant Type Select the check box next to the type of applicant to include in the search. You can select more than one. Options are:

- *Employee*
- *External Applicant*
- *Non-Employee*

Exclude Applicants Select the applicants you want excluded from the search. You can add more than one exclusion type. Options are:

- *010 - Active*
- *020 - Hired*
- *030 - Inactive*
- *040 – Queued*

Application Date Range Enter or select the beginning date to use when searching for applications.

to Enter or select the end date to be used when searching for applications.

Referral Source Select a referral source.

Referral SubSource Select a referral subsource.

Accomplishments Enter text that defines the accomplishments to include in the search. If you entered a job opening ID, the system displays the accomplishments entered for the job opening. You can change the displayed text or enter additional text.

Competencies Enter text that defines the competencies to include in the search. If you entered a job opening ID, the system displays the competencies entered for the job opening. You can change the displayed text or enter additional text.

Populate from Job Click this button to have competencies and accomplishments pulled from the job opening if the job opening has any defined.

Education Enter text that defines the education to include in the search. If you entered a job opening ID, the system displays the education entered for the job opening. You can change the displayed text or enter additional text.

Work Experience Enter text that defines the work experience to include in the search. If you entered a job opening ID, the system displays the work experience entered for the job opening. You can change the displayed text or enter additional text.

Job Family Select a job family to include in the search. If you entered a job opening ID, the system displays the job family entered for the job opening. You can override the displayed job family and select another.

Recruiting Location Area Select a recruiting location to include in the search. If you entered a job opening ID, the system displays the recruiting location entered for the job opening. You can override the displayed job family and select another.

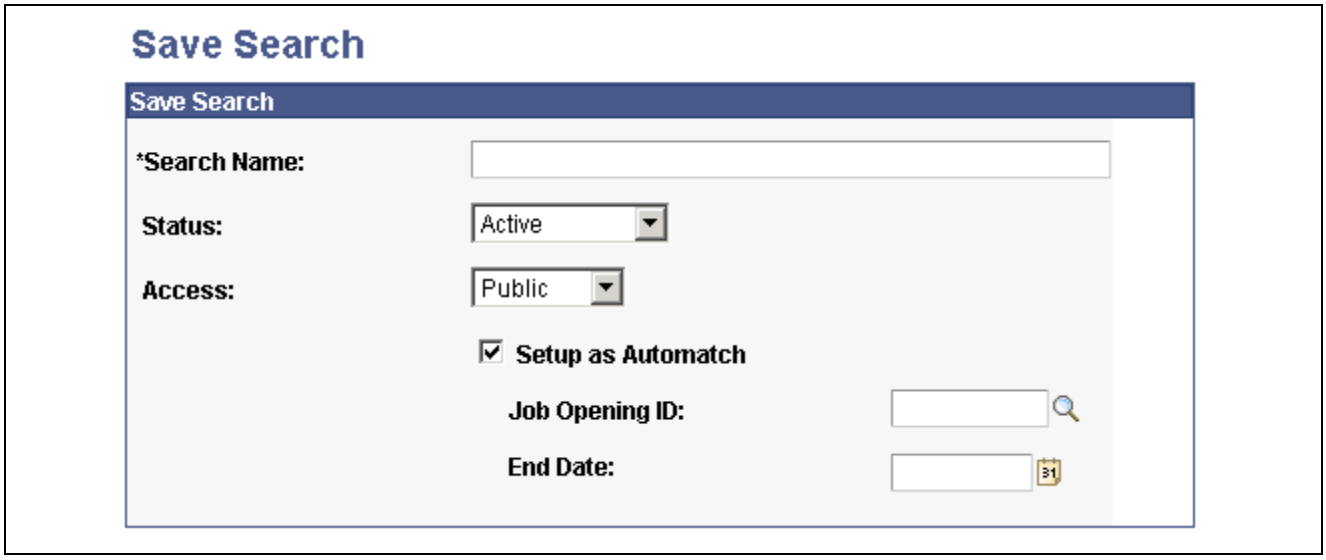
Country Enter the country to include in the search.

State Enter the state to include in the search.

City Enter the city to include in the search.

Saving Applicant Search Criteria

Access the Save Search page.



Save Search

Search Name Enter a name for this search. Select a name that identifies the criteria used in this search.

Access Select the access type for this search. Options are:

- *Private:* Only the creator of the search can access this search. If the search is to designated as an Automatch search, access must be set to private.
- *Public:* Anyone can access this search.

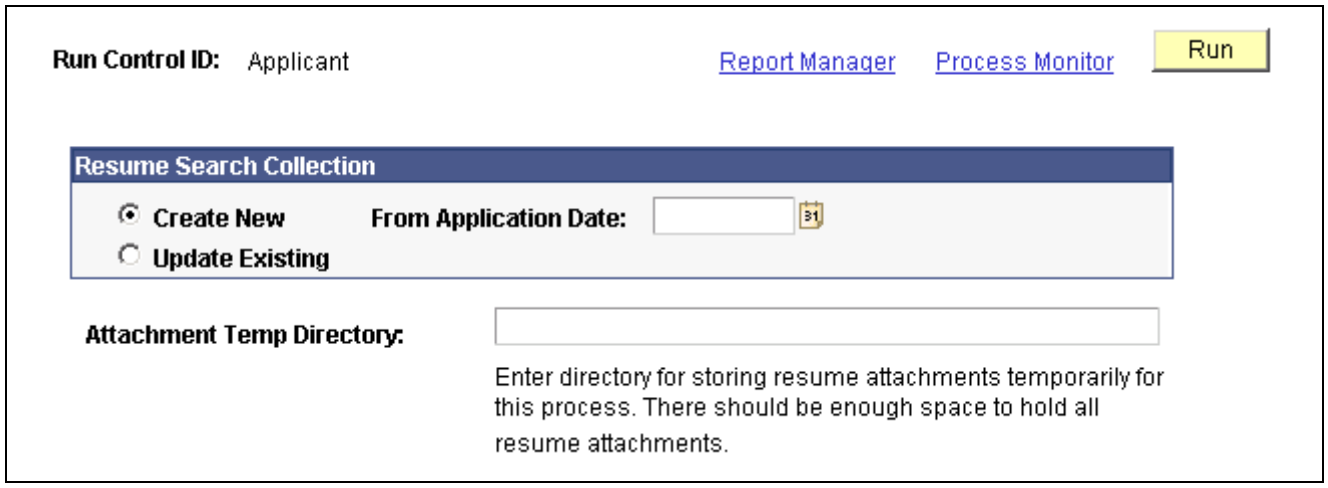
Setup as Automatch Select if the search is to be designated as an automatch search.

Job Opening ID This field appears if you select the Setup as Automatch check box. Select a job opening ID.

End Date This field appears if you select the Setup as Automatch check box. Enter a date on which this automatch search is no longer valid.

Building the Applicant Index

Access the Build Applicant Index page.



Build Applicant Index page

Resume Search Collection

This process run in two modes.

Create New Builds the index from the specified date entered in the From Application Date field.

Update Existing Adds, updates, and deletes entries in an existing index file.

Attachment Temp Directory (attachment temporary directory) If you have set up an attachment directory for applying online to store resumes, enter the location of the file server where the attachments are stored. If you store resumes in the database, enter a temporary path to a file server that can be used to store the resumes temporarily during the Applicant Index process.

This path should be relative to the PeopleSoft Process Scheduler. Make sure that all machines that run the Build Applicant Index process have access to this directory.

Running Automatch Searches

Access the Run Automatch Search Agent page.



Run Automatch Search Agent page

Searching for Job Openings

This section provides an overview of job openings searches and discusses how to search for job openings.

Understanding Job Opening Searches

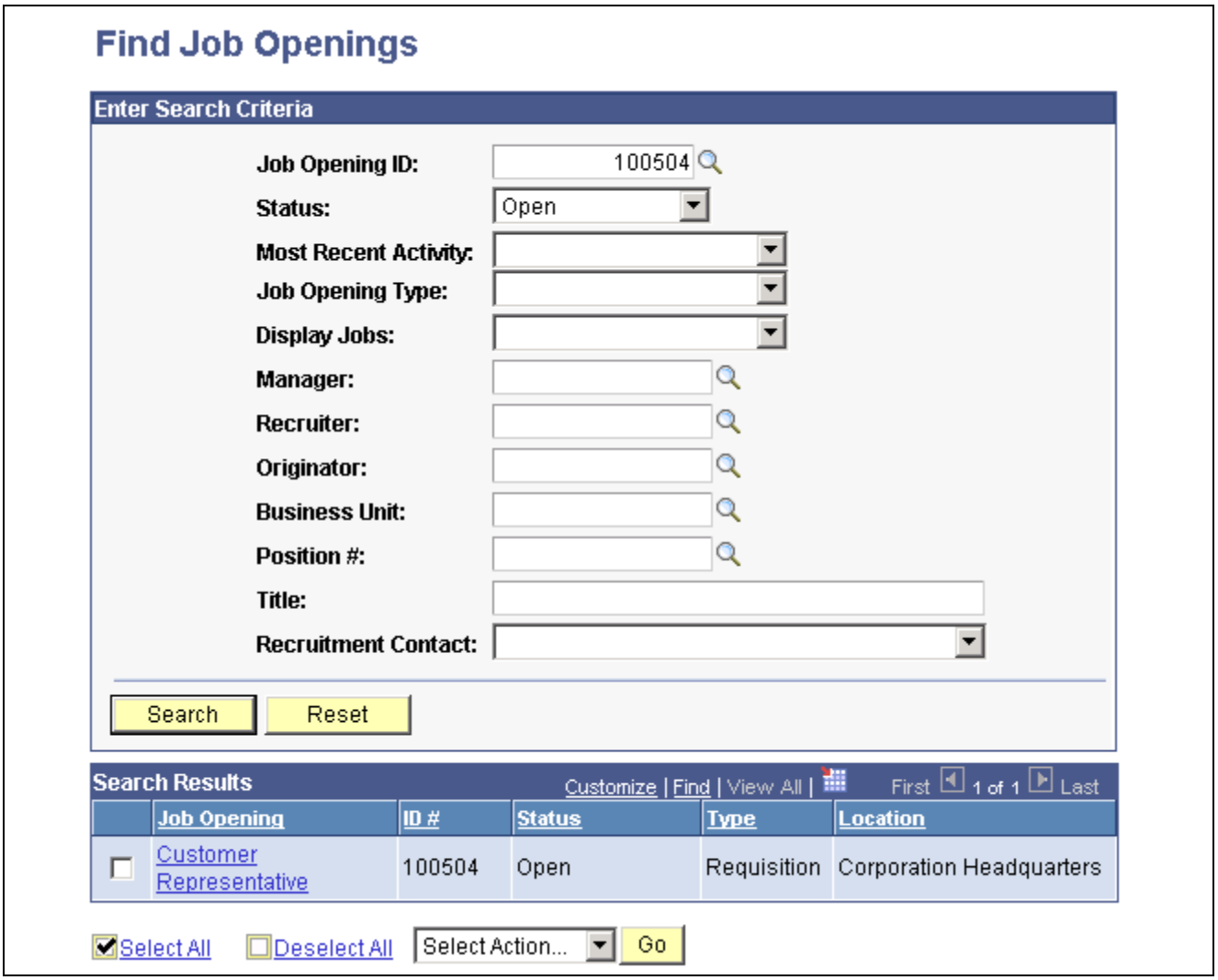
To search for job openings, use the Find Job Openings page. The Find Job Opening page enables you to search for job openings in the database based on specific record fields.

Pages Used to Search for Job Openings

Page Name	Object Name	Navigation	Usage
Find Job Openings	HRS_JO_FIND_JOB	Recruiting, Find Job Openings, Find Job Openings	Search for and select job openings.

Searching for Job Openings

Access the Find Job Openings page.



Find Job Openings page

Enter Search Criteria

Search Click to execute the search.

Reset Click to clear the search criteria fields.

Job Opening ID Enter or select the job opening ID to include in the search.

Status Select the status to include in the search. Options are:

- *Canceled*
- *Denied*
- *Draft*
- *Filled/Closed*
- *Hold*
- *Open*
- *Pending Approval*

- *All*

Most Recent Activity Select the date range that you want to define which job openings to include in the search. Options are:

- *Last 2 Weeks*
- *Last 3 Days*
- *Last Month*
- *Last Week*
- *Last Year*
- *Today*
- *View All*
- *Yesterday*

Job Type Select the type of jobs to include in the search. Options are:

- *Continuous Job Opening*
- *Standard Requisition*

Display Jobs Select the which jobs to include in the search. Options are:

- *All Jobs*
- *Assigned to me*
- *Associated to me*

Manager ID Enter or select a manager ID to include in the search.

Recruiter Enter or select a recruiter ID to include in the search.

Creator Enter or select a creator ID to include in the search.

Business Unit Enter or select a business unit to include in the search.

Search Results

Title Click to access the Job Opening page.

Take Action Select an action you want to make to the job openings that have the check box next to the job title selected and click Go. Actions are:

- *Add Note:* Accesses the Add Note page.
- *Cancel:* Changes the job opening status to *Canceled*.
- *Close:* Changes the job opening status to *Closed*.
- *Hold:* Changes the job opening status to *Hold*.

Searching for External Job Postings

This section provides an overview job posting searches and discusses how to:

- Define basic criteria for job posting searches.
- Define advanced keyword searches.
- Build the job index.

Understanding Job Postings Searches

To search for job posting use the Search Postings - Basic Search or the Advanced Keyword Search pages. Search for Job Postings provides a list of all open job postings whose job posting titles or descriptions match the criteria you entered.

Job posting searches are only as current as the index used to access the data. Since job openings are continually being added to the database, you must frequently build the job index to maintain current job openings and job postings.

Pages Used to Search for Job Postings

Page Name	Object Name	Navigation	Usage
Search Postings - Basic Search	HRS_REC_SCHJOB	Recruiting, Postings, Search Postings, Search Postings - Basic Search	Define basic criteria for job posting searches.
View Job Posting	HRS_REC_JBPST	Click the posting title link in the Search Results group box on the Search Postings - Basic Search page.	View job posting details.
Build Job Index	HRS_JSRCH_RUN_PROC	Recruiting, Administration, Build Job Index, Build Job Index	Build the job index based on job openings in the database.

Defining Basic Criteria for Job Posting Searches

Access the Search Job Postings - Basic Search page.



Search Job Postings - Basic Search page

Keyword Search

Search For Enter the words that you want to search for in the job postings. These words are compared to the job posting title and description.

Posted Within Select the date range for the job postings to include in the search. Options are:

- *Anytime*
- *Last Month*
- *Last Three Months*
- *Last Week*
- *Last Year*

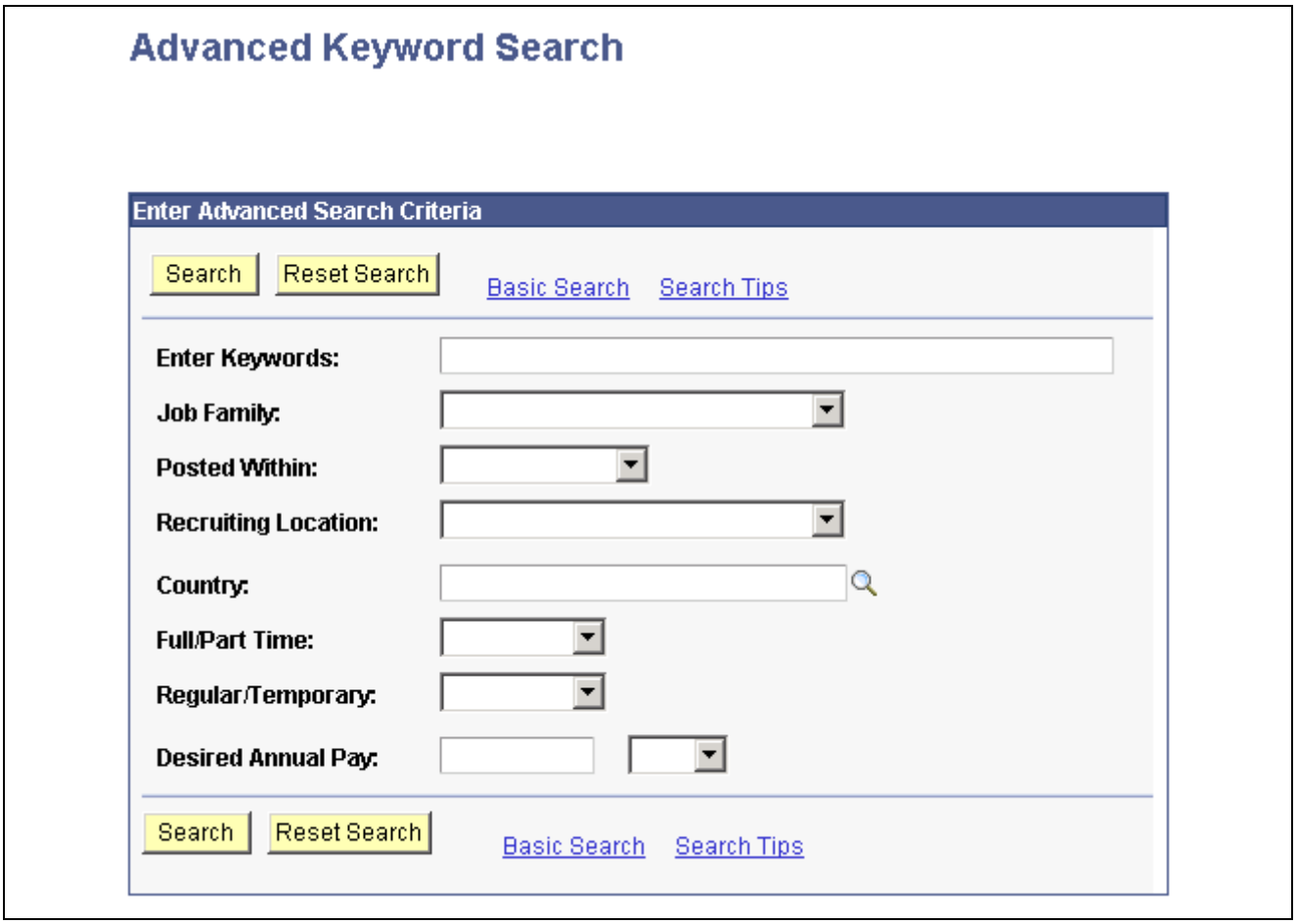
Search Results

Posting Title Click link to access the View Job Posting Details page.

Job Opening ID Click link to access the Job Opening page.

Defining Advanced Keyword Searches

Access the Search Postings - Basic Search page. Click the Advanced Keyword Search link.



Advanced Keyword Search page

Enter Key Words Enter the words that you want to search for in the job posting. These words are compared to the job posting title and description.

Job Family Select a job family.

Posted Within Select the date range for the job posting to include in the search. Options are:

- *Anytime*
- *Last Month*
- *Last Three Months*
- *Last Week*
- *Last Year*

Recruiting Location Select a recruiting location. The system compares this to the Recruiting Location on the job opening.

Country Select a country. The system compares this to the Country field on the job opening.

Full/Part Time Select either full-time or part-time. The system compares this to the Full/Part Time field on the job opening.

Regular/Temporary Select either regular or temporary. The system compares this to the Regular/Temporary field on the job opening.

Desired Annual Pay Enter an amount and select a currency code.

Building the Job Index

Access the Build Job Index page.



Build Job Index page

Job Posting Search Collection

This process run in two modes.

Create New Creates a new job posting index. If you enter a date in the Open Date From field all job postings with a posting open date later than the specified date are indexed.

Update Existing Adds, updates, and deletes entries in an existing index file.

Running the Job Search Agent

This section provides an overview of the Job Agent Application Engine process (HRS_JOB_AGNT) and discusses how to run the Job Agent process.

See Also

PeopleSoft Enterprise Candidate Gateway 8.9 PeopleBook, "Using Candidate Gateway," Searching for Job Openings

Understanding the Job Agent Process

To match an applicant's job search agent profile to open job openings, an administrator runs the Job Agent (HRS_JOB_AGNT) process.

During the process, the system:

1. Searches for old job search agents in HRS_AGNT_PROF.

The system deletes job search agents that are out of date. The system determines whether the job search agent is out of date by taking the last-modified date in the HRS_AGNT_PROF table and adding the number of days that you enter in the Days Job Search Agent Active field on the Recruiting Installation - Installation Options page. The process compares the resulting date to the system date. If the resulting date is less than the system date, the system deletes the job search agent.

See Chapter 2, "Setting Up the Recruiting Process," Defining Recruiting Installation Defaults, page 6.

2. Compares job search agent search criteria to job openings.

   The job opening must be approved and open and the posting source must be a Company type recruitment source. For external applicants, the posting type must be *External.* For internal applicants, the posting type must be *Internal.*

   For applicants to see the job opening posting description, the posting description must be visible to the applicant. Specify which applicants a posting description is visible to by using the Visible field on the Job Opening - Posting Information page.

3. Writes results to a file called HRS_AGNT_RSLT.

   The system sends a notification using the JobAgentNotification template to the applicant, if the applicant provided an email address with their contact information, so that the applicant can see the results of the search. The system notifies applicants of all job openings that match the search criteria.

   The system also posts a notification in the Notifications grid on the Careers Home page in PeopleSoft Enterprise Candidate Gateway. Applicants can click on the subject link for the notification to view the results. If the applicant has multiple job search agents the system posts a separate notification for each job search agent in the Notifications group box.

Page Used to Run the Job Agent Process

Page Name	Object Name	Navigation	Usage
Job Search Agent	HRS_RUN_JOBAGNT	Recruiting, Administration, Run Job Search Agent, Job Search Agent	Run the Job Agent process.

Running the Job Agent Application Engine Process

Access the Job Search Agent page.

Click Run to run this request. PeopleSoft Process Scheduler runs the Job Agent process at user-defined intervals.

See Also

PeopleTools 8.45 PeopleBook: Using PeopleSoft Applications

CHAPTER 11

Screening and Routing Applicants

This chapter provides an overview of the screening process flow and discusses how to:

- Review applicants linked to job openings.
- (USF) Run priority placement.
- Rate applicants.
- Review screening levels.
- Review and edit screening criteria.
- Run screening levels.
- (USF) Assign competitive and noncompetitive statuses to applicants.
- (USF) Rank applicants.
- Route applicants.

Understanding the Screening Process Flow

Screening is the process used by recruiters to evaluate a list potential candidates and narrow the list to a few qualified applicants that can be interviewed or hired. To screen applicants:

1. Review applicants linked to a job opening.
2. (USF) Run the priority placement process.
3. Review applicants' competencies and accomplishments.
4. (Optional) Rate applicants' competencies and accomplishments.
5. Review and edit screening requirements.
6. Run screening levels.
7. (USF) Assign competitive and noncompetitive statuses to applicants.
8. (USF) Rank applicants.
9. (USF) Run the Certificate of Eligibles process.
10. Route applicants.

Review Applicants Linked to Job Openings

This section discusses how to review applicants linked to job openings.

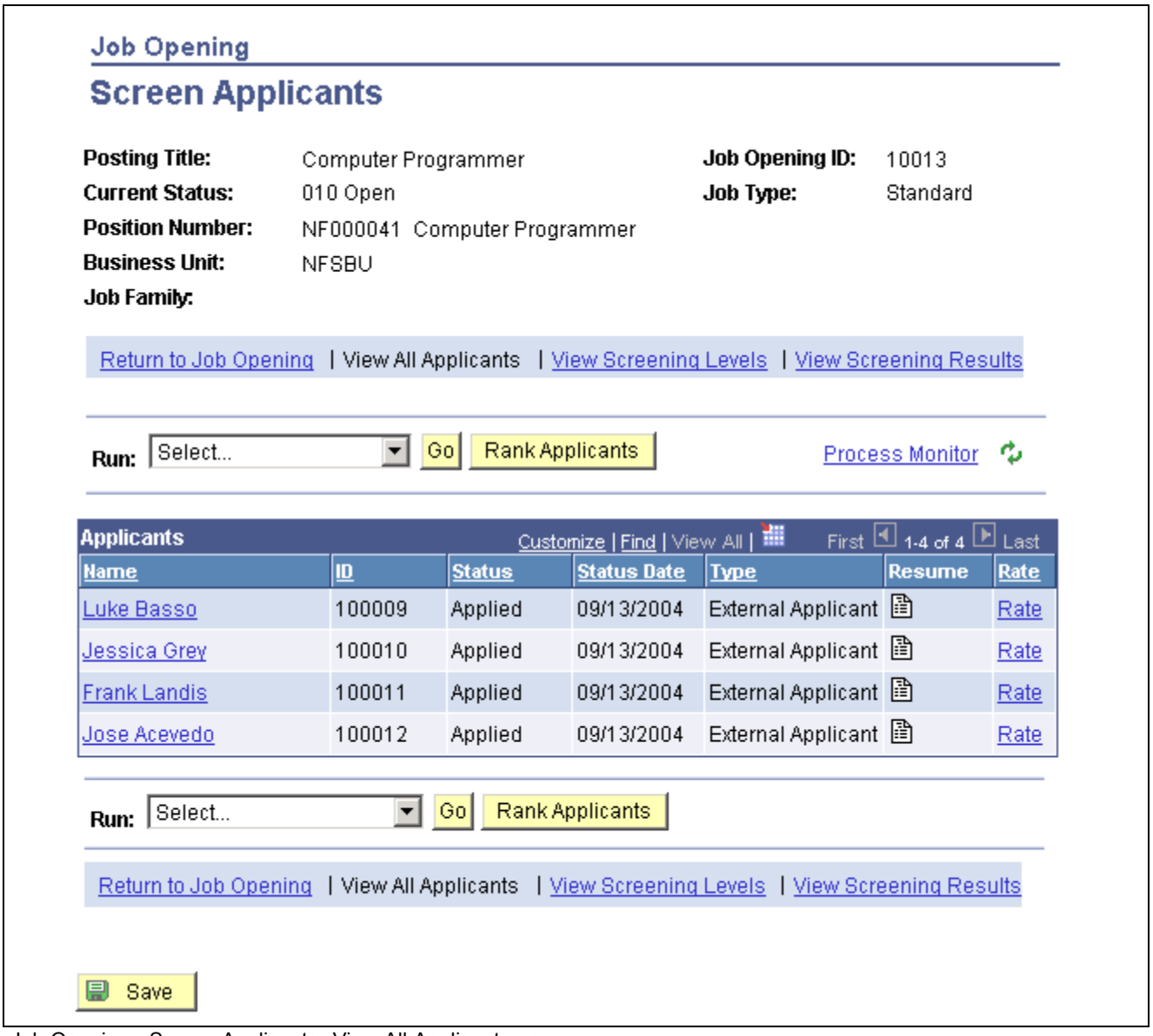
You can start the screening process when you have all the applicants who applied for a job opening linked to the job opening.

Pages Used to Review Applicants Linked to Job Openings

Page Name	Object Name	Navigation	Usage
Find Job Openings	HRS_JO_FIND_JOB	Recruiting, Find Job Openings, Find Job Openings	Search for and select job openings.
Job Opening - Manage Applicants	HRS_JO_360	Click the job opening link in the Search Results group box on the Find Job Openings page.	Review applicants linked to a job opening and perform various tasks.
Job Opening - Screen Applicants: View All Applicants	HRS_JO_SCR_LIST	Click the Screen Applicants link on the Job Opening - Manage Applicants page.	Review applicants linked to a job opening and perform various tasks related to screening.

Review Applicants Linked to Job Openings

Access the Job Opening - Screen Applicants: View All Applicants page.



Job Opening - Screen Applicants: View All Applicants page

Return to Job Opening Click to access the Job Opening page.

View All Applicants Click to refresh the current page.

View Screening Levels Click to access the Job Opening - Screening Levels: View Screening Levels page

Run Click to run screening levels and to run the Priority Placement process for federal users.

Applicants

This group box lists all applicants linked to the job opening.

Name Click to access the Manage Applicant page.

Resume Click the Resume icon to access the Manage Applicant - Resume page.

Rate	Click to access the Screen Applicants - Rate Applicants page.

(USF) Running Priority Placement

This section provides an overview of the priority placement processing, lists prerequisites, and lists the pages used to run priority placement.

Understanding the Priority Placement Processing

Applicants with priority placement entitlements have special placement considerations at an equivalent or higher series and grade combination than that of the jobs being filled. Applicants with priority placement preference that have not applied for specific job openings may be linked to job opening through the Priority Placement process

The Priority Placement process identifies those applicants that have the same Pay Plan and Occupational Series, and also ensures that the applicant's Salary Grade is equal to or greater than the grade specified on the job opening. The process then compares those applicants with all active job openings that have that priority place code.

When an applicant has two priority placement codes for a particular job, and only one priority placement code method can be considered for that job series, the process determines which code to use by looking at the recruiting type that was defined on the job opening.

After an applicant has been linked to a job opening via the Priority Placement process, the applicant's status is set to *Applied*. The applicant will then be subject to the same level of screening as other applicants, based on the criteria defined in the screening level(s).

The Priority Placement process is run after the closing date of the job posting and before Screening Levels are processed.

Prerequisites

Before you begin processing applicants with priority preference:

- Set up priority preference programs.
- Enter applicant priority placement information.
- The job posting is closed.

See Chapter 2, "Setting Up the Recruiting Process," Setting Up Priority Placement Codes, page 30.

Pages Used to Run Priority Placement

Page Name	Object Name	Navigation	Usage
Find Job Openings	HRS_JO_FIND_JOB	Recruiting, Find Job Openings, Find Job Openings	Search for and select job openings.
Job Opening	HRS_JO_360	Click the job title link in the Search Results group box on the Find Job Openings page.	Review job opening information and perform various tasks related to job openings.
Job Opening - Screen Applicants: View All Applicants	HRS_JO_SCR_LIST	Click the Screen Applicants link on the Job Opening page.	Review screening information and perform various tasks related to screening.
Process Priority Placement	HRS_PRI_PLCM	Select *Priority Placement* in the Runfield and click GO, on the Job Opening - Screen Applicants page.	Runs the priority placement process.

(USF) Rating Applicants

This section provides an overview of rating applicants and discuss how to rate applicants.

Understanding Rating Applicants

Rating an applicant is an optional step. First review an applicant's competencies and accomplishments as related to the job opening screening criteria. If necessary, assign a score to the areas where the system could not determine whether the applicant has met the screening criteria.

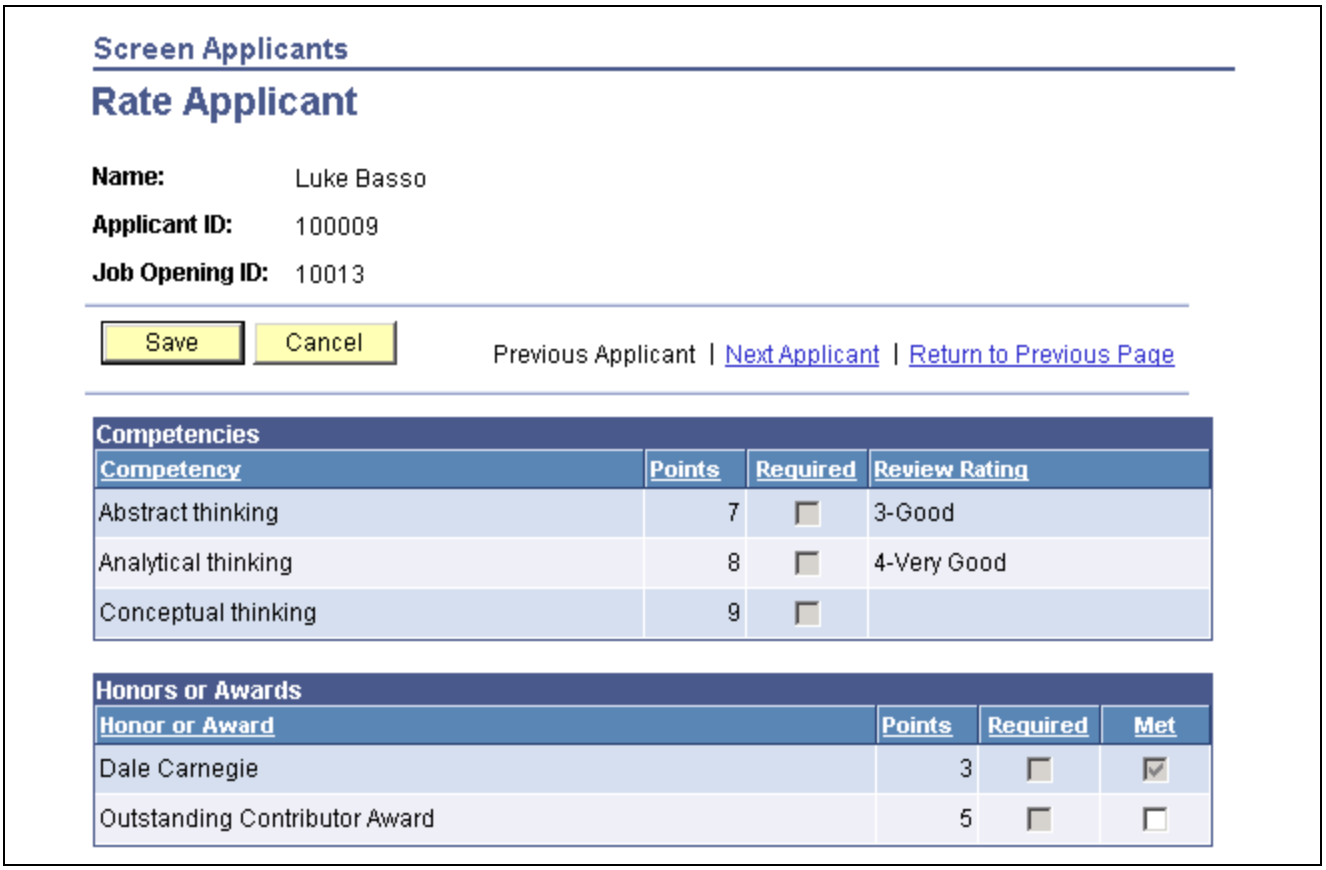
To rate applicants, use the Screen Applicants - Rate Applicant page. This page displays the accomplishments and competencies defined as screening criteria and whether the system determined if the applicant has met the accomplishment and competencies criteria. The competency section displays the most recent ratings for an applicant, if they exist.

Pages Used to Rate Applicants

Page Name	Object Name	Navigation	Usage
Find Job Openings	HRS_JO_FIND_JOB	Recruiting, Find Job Openings, Find Job Openings	Search for and select job openings.
Job Opening	HRS_JO_360	Click the job title link in the Search Results group box on the Find Job Openings page.	Review job opening information and perform various tasks related to job openings.
Job Opening - Screen Applicants: View All Applicants	HRS_JO_SCR_LIST	Click the Screen Applicants link on the Job Opening page.	Review screening information and perform various tasks related to screening.
Screen Applicants - Rate Applicant	HRS_RATE_APP	Click the Rate link for the applicant you want to rate in the Applicants group box on the Job Opening - Screen Applicants: View All Applicants page.	Runs the Rate (HRS_APP_RATING) process.

Rating Applicants

Access the Screen Applicants - Rate Applicant page.



Screen Applicants

Rate Applicant

Name: Luke Basso

Applicant ID: 100009

Job Opening ID: 10013

Save | Cancel | Previous Applicant | Next Applicant | Return to Previous Page

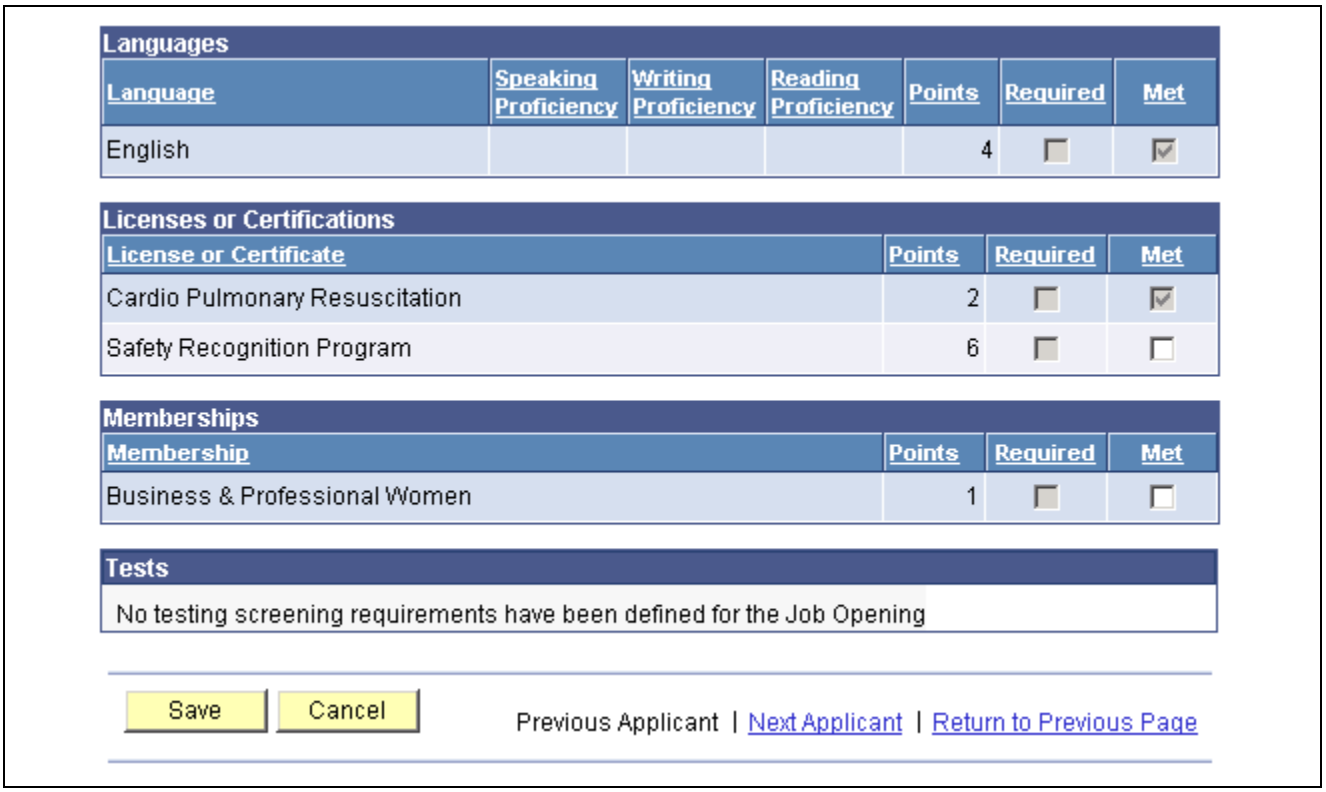
Competencies

Competency	Points	Required	Review Rating
Abstract thinking	7	☐	3-Good
Analytical thinking	8	☐	4-Very Good
Conceptual thinking	9	☐	

Honors or Awards

Honor or Award	Points	Required	Met
Dale Carnegie	3	☐	☑
Outstanding Contributor Award	5	☐	☐

Screen Applicants - Rate Applicant page (1 of 2)



Languages

Language	Speaking Proficiency	Writing Proficiency	Reading Proficiency	Points	Required	Met
English				4	☐	☑

Licenses or Certifications

License or Certificate	Points	Required	Met
Cardio Pulmonary Resuscitation	2	☐	☑
Safety Recognition Program	6	☐	☐

Memberships

Membership	Points	Required	Met
Business & Professional Women	1	☐	☐

Tests

No testing screening requirements have been defined for the Job Opening

Save | Cancel | Previous Applicant | Next Applicant | Return to Previous Page

Screen Applicants - Rate Applicant page (2 of 2)

Review the competencies and accomplishments the system was able to rate and apply ratings to those it was not.

Save If you manually rate the applicant, click Save to save your rating.

Previous Applicant Displays the results of the previous applicant in the list of applicants linked to the job opening.

Next Applicant Processes and displays the results of the next applicant in the list of applicants linked to the job opening.

Reviewing Screening Levels

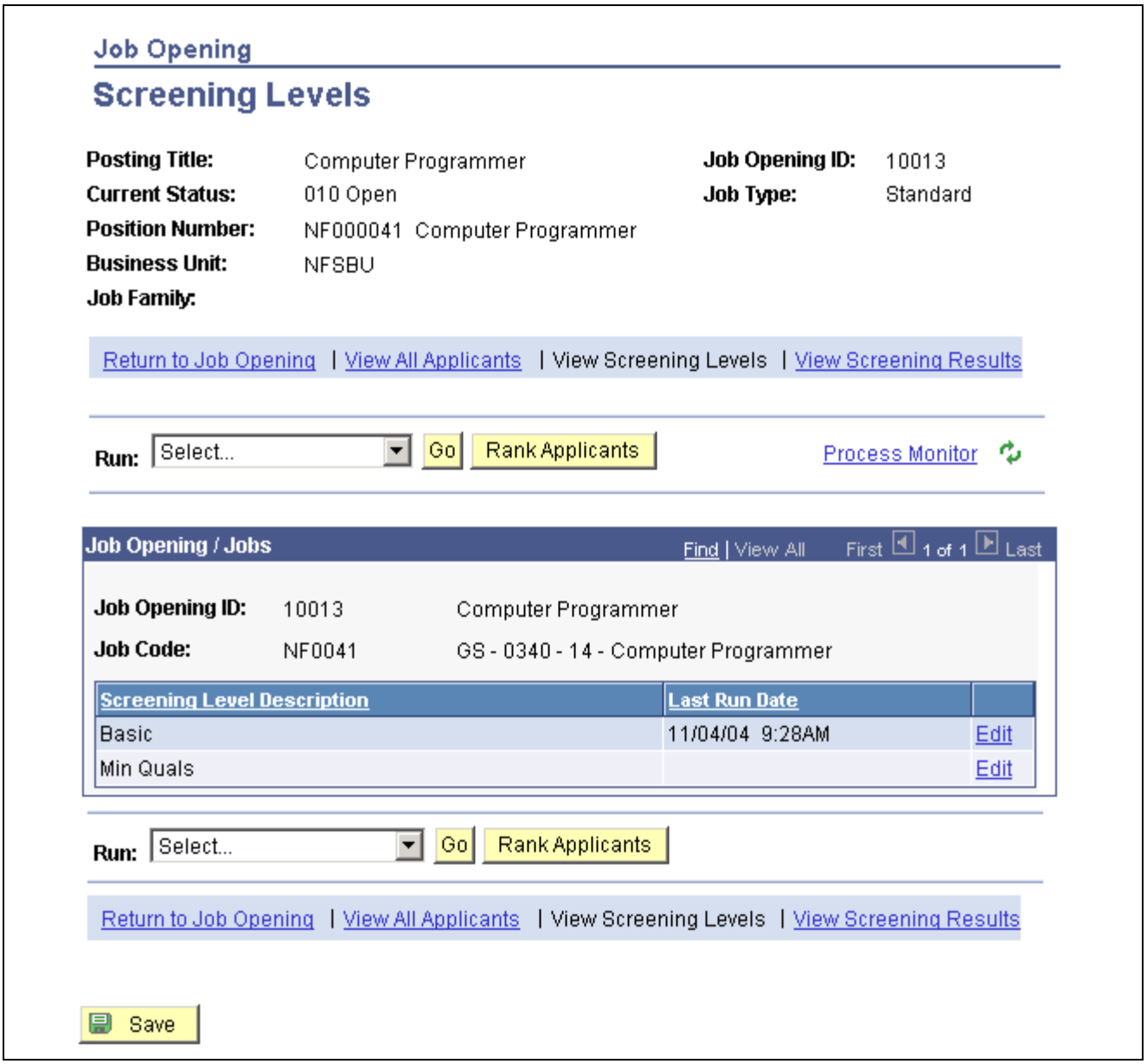
This section discusses how to review screening levels.

Pages Used to Review Screening Levels

Page Name	Object Name	Navigation	Usage
Find Job Openings	HRS_JO_FIND_JOB	Recruiting, Find Job Openings, Find Job Openings	Search for job openings.
Job Opening	HRS_JO_360	Click the job title link in the Search Results group box on the Find Job Openings page.	Review job opening information and perform various tasks related to job openings.
Job Opening - Screen Applicants: View All Applicants	HRS_JO_SCR_LIST	Click the Screen Applicants link on the Job Opening page.	Access the screening component to review screening information and perform various tasks related to screening.
Job Opening - Screening Levels	HRS_JO_SCR_LVL	Click the View Screening Levels link on the Job Opening - Screen Levels page.	View screening levels associated with the job opening.

Reviewing Screening Levels

Access the Job Opening - Screening Levels page.



Job Opening - Screening Levels page

Job Opening / Jobs

This group box displays the information about the job opening and the screening levels associated with the job opening. If there are multiple job associated with the job opening, you can select the next job opening in the scroll area.

Screening Level Description

This group box displays the name of each screening level associated with the job opening and the date on which the screening level was last run. You can click the Edit link to update the screening criteria associated with the screening level.

Reviewing and Editing Screening Criteria

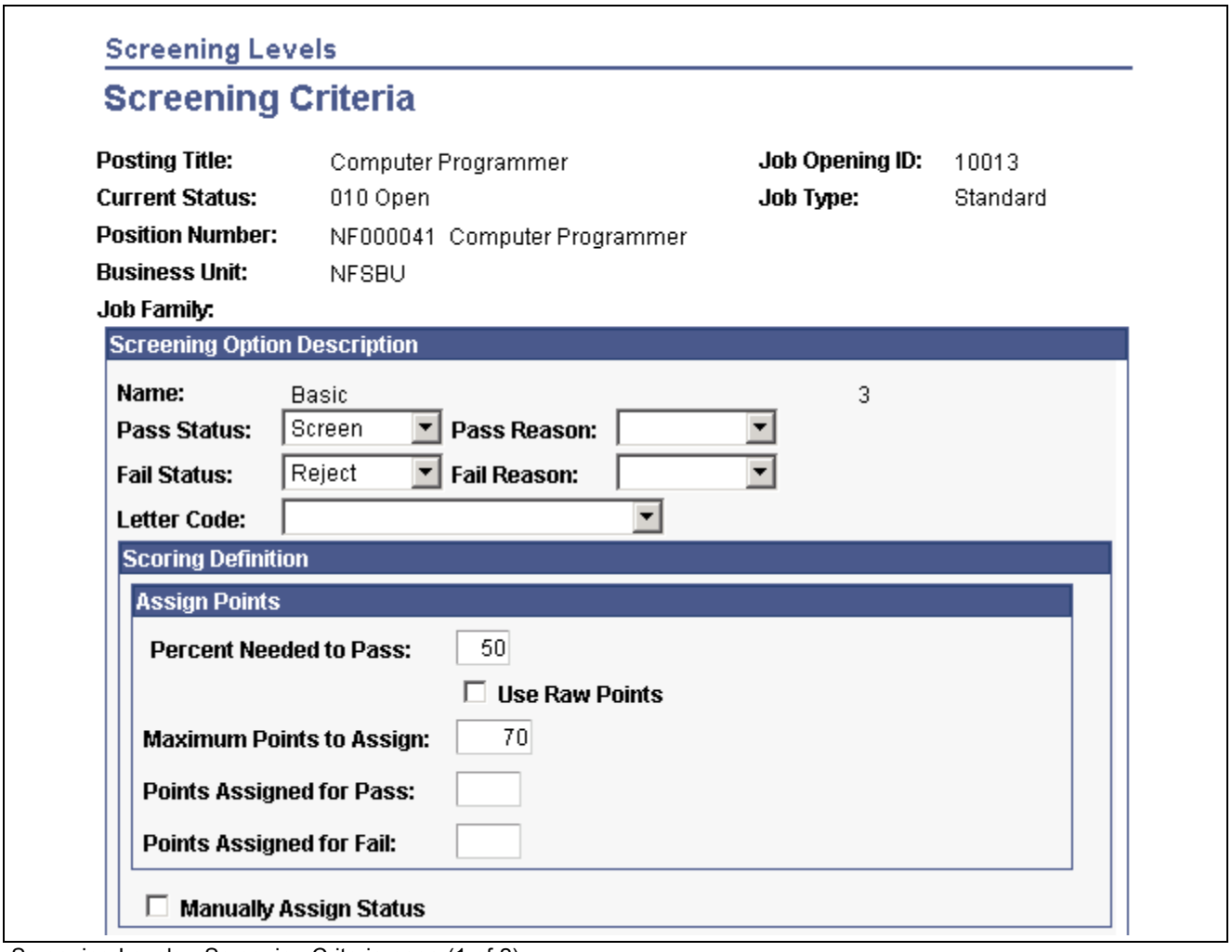
This section discusses how to review and edit screening criteria.

Pages Used to Review and Edit Screening Requirements

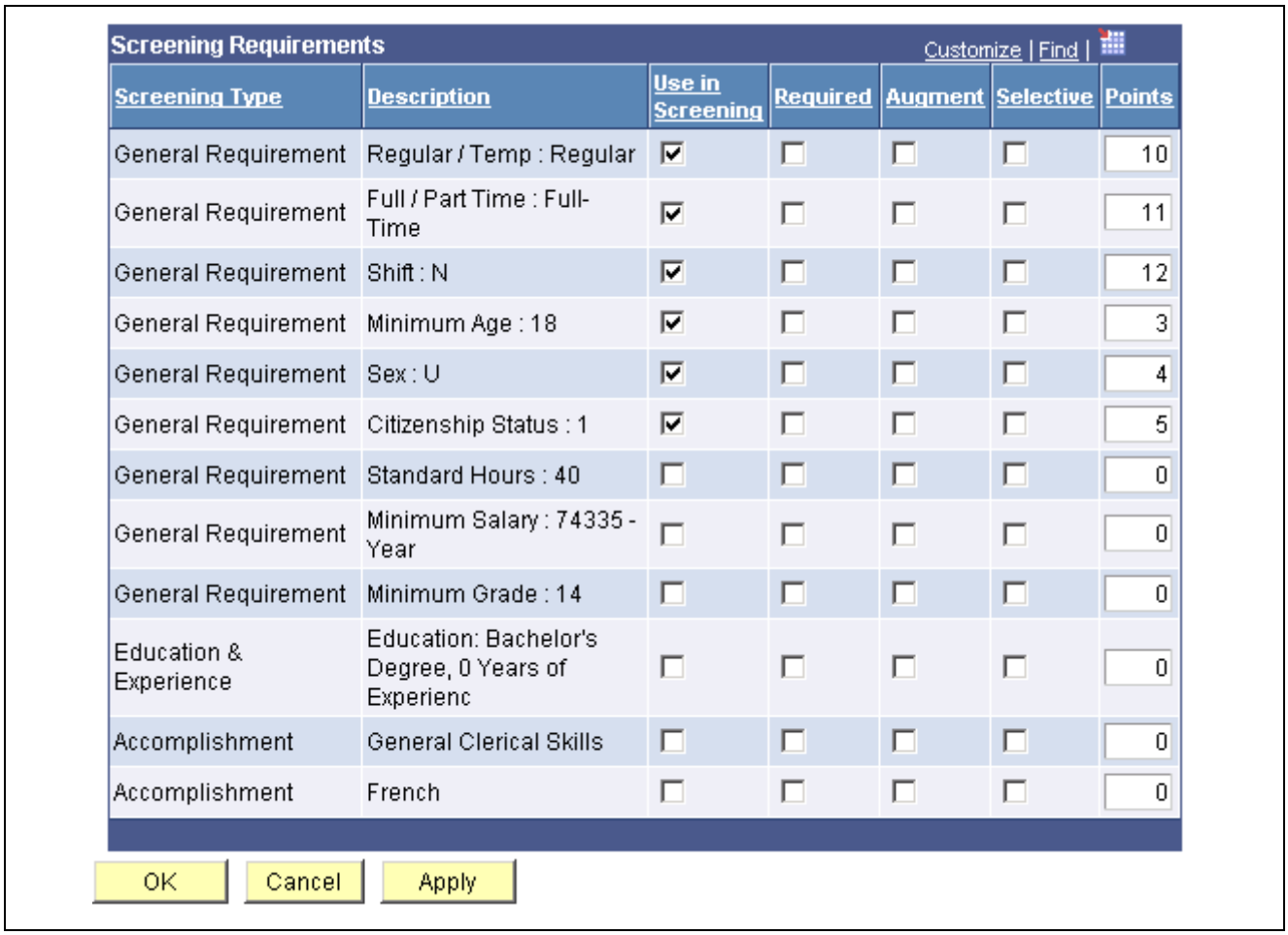
Page Name	Object Name	Navigation	Usage
Find Job Openings	HRS_JO_FIND_JOB	Recruiting, Find Job Openings, Find Job Openings	Search for job openings.
Job Opening	HRS_JO_360	Click the job title link in the Search Results group box on the Find Job Openings page.	Review job opening information and perform various tasks related to job openings.
Job Opening - Screen Applicants	HRS_JO_SCR_LIST	Click the Screen Applicant icon on the Job Opening page.	Access the screening component to review screening information and perform various tasks related to screening.
Job Opening - Screening Levels: View Screening Levels	HRS_JO_SCR_LVL	Click the View Screening Levels link on the Job Opening - Screen Applicants page.	View screening levels associated with the job opening.
Screening Levels - Screening Criteria	HRS_JO_SCR_DTL	Click the Edit link next to the screening level you want to edit on the Job Opening - Screening Levels: View Screening Levels page.	Edit the screening criteria.

Reviewing and Editing Screening Criteria

Access the Screening Levels - Screening Criteria page.



Screening Levels - Screening Criteria page (1 of 2)



Screening Requirements Customize | Find |

Screening Type	Description	Use in Screening	Required	Augment	Selective	Points
General Requirement	Regular / Temp : Regular	☑	☐	☐	☐	10
General Requirement	Full / Part Time : Full-Time	☑	☐	☐	☐	11
General Requirement	Shift : N	☑	☐	☐	☐	12
General Requirement	Minimum Age : 18	☑	☐	☐	☐	3
General Requirement	Sex : U	☑	☐	☐	☐	4
General Requirement	Citizenship Status : 1	☑	☐	☐	☐	5
General Requirement	Standard Hours : 40	☐	☐	☐	☐	0
General Requirement	Minimum Salary : 74335 - Year	☐	☐	☐	☐	0
General Requirement	Minimum Grade : 14	☐	☐	☐	☐	0
Education & Experience	Education: Bachelor's Degree, 0 Years of Experienc	☐	☐	☐	☐	0
Accomplishment	General Clerical Skills	☐	☐	☐	☐	0
Accomplishment	French	☐	☐	☐	☐	0

OK Cancel Apply

Screening Levels - Screening Criteria page (2 of 2)

This page is the same as when you created the job opening and defined the screening criteria. You can modify screening criteria here to meet your needs. To add criteria, use the Job Opening page.

See Chapter 8, "Creating Job Openings," Adding Screening Criteria to Screening Levels, page 165.

Running Screening Levels

This section provides an overview of screening levels, lists prerequisites, and discusses how to:

- Run screening levels.
- Review screening results.
- Review scoring details.

Understanding Screening Levels

Screening levels are defined used the Screening Definition page. They are then associated to a screening template, which in turn is linked to a recruitment template, that is ultimately used when a job opening is created. Screening levels contain the requirements for the job, and when processed, compare those requirements to the applicant's data. When applicable, points are assigned to the applicant, based on the screening level definition. The screening template associated with the job opening determines the screening levels available for you to run. The screening criteria defined on the job opening determines which criteria the applicant is compared to and the number of points assigned.

This table summarizes the possible job requirements that can be included in a screening level and what it is compared to on the applicant information:

Job Opening Field	Applicant Field
Citizenship Status	Are you a U.S. Citizen?
Gender	Gender
Draft Status	Military Status
Maximum Age	Date of Birth
Minimum Age	Date of Birth
Minimum Salary	Minimum Pay
(USF) Minimum Pay Grade	(USF) Minimum Acceptable Pay Grade
Full/Part Time	Full/Part Time
Shift	Desired Shift
Regular/Temporary	Regular/Temporary
(USF) Recruiting Type	(USF) Previous Federal Employee (USF) Current Federal Employee (USF) Previous Agency Employee (USF) Current Agency Employee
Location	First Choice Second Choice
RS Location	First Choice Second Choice
Start Date	Desired Start Date
Standard Hours/Week	Desired Hour Per Week
Travel Percentage	Willing to Travel

Other screening requirements can be:

- Education and Experience.
- Competencies.
- Languages.
- Honors/Awards.
- Licenses and Certificates.
- Memberships.
- Training.
- Required Tests.
- Screening Questions.

Prerequisites

Before you begin running screening levels:

1. Define screening definitions.
2. Create screening templates.
3. Link screening template to recruitment template.
4. Define job opening requirements.
5. Add screening requirements to screening levels, using the screening template on the job opening.
6. (USF) Run priority placement process.

See Chapter 2, “Setting Up the Recruiting Process,” Understanding Screening Definitions, page 25.

See Chapter 3, “Setting Up Recruiting Templates,” Setting Up Screening Templates, page 45.

See Chapter 3, “Setting Up Recruiting Templates,” Setting Up Recruitment Templates, page 50.

See Chapter 8, “Creating Job Openings,” Adding Screening Criteria to Screening Levels, page 165.

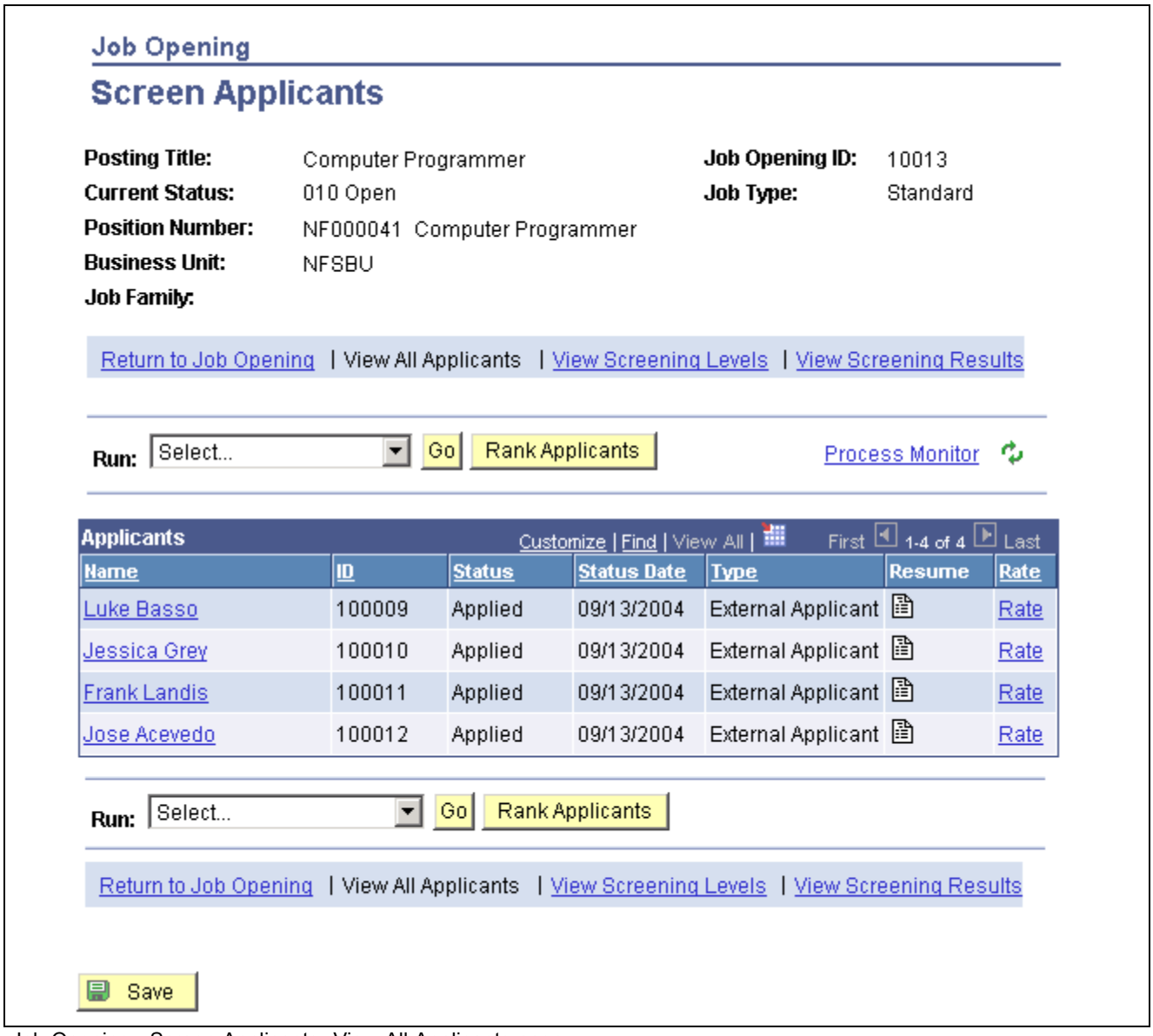
See Chapter 11, “Screening and Routing Applicants,” (USF) Running Priority Placement, page 250.

Pages Used to Run Screening Levels

Page Name	Object Name	Navigation	Usage
Find Job Openings	HRS_JO_FIND_JOB	Recruiting, Find Job Openings, Find Job Openings	Search for job openings.
Job Opening	HRS_JO_360	Click the job title link in the Search Results group box on the Find Job Openings page.	Review job opening information and perform various tasks related to job openings.
Job Opening - Screen Applicants: View All Applicants	HRS_JO_SCR_LIST	Click the Screen Applicants link on the Job Opening page.	Review screening information and perform various tasks related to screening.
Job Opening - Screening Results: View Screening Results	HRS_JO_SCR_RSLT	Click the View Screening Results link on the Job Opening - Screen Applicants: View All Applicants page.	Review the results of the screening levels.

Running Screening Levels

Access the Job Opening - Screen Applicants: View All Applicants page.



Job Opening - Screen Applicants: View All Applicants page

Run Select the screening level you want to run.

Go Click to run the screening definition selected in the Run field.

(USF) Rank Click to access the Screen Applicants - Rank Applicants page.

See Chapter 11, "Screening and Routing Applicants," (USF) Ranking Applicants, page 268.

Applicants

Displays a list of the applicants linked to the job opening. All applicants with a status less than Screened appear.

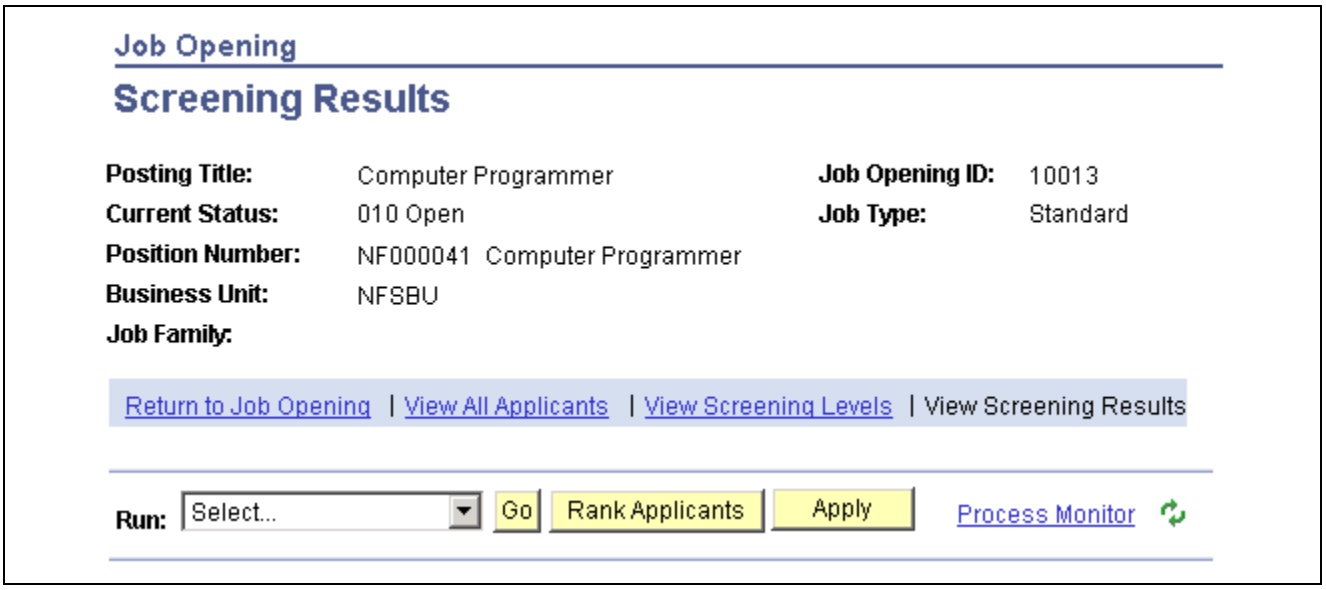
Name Click the name link to access the Manage Applicant page.

Resume Click the Resume icon to access the Manage Applicant - Applicant Resume page.

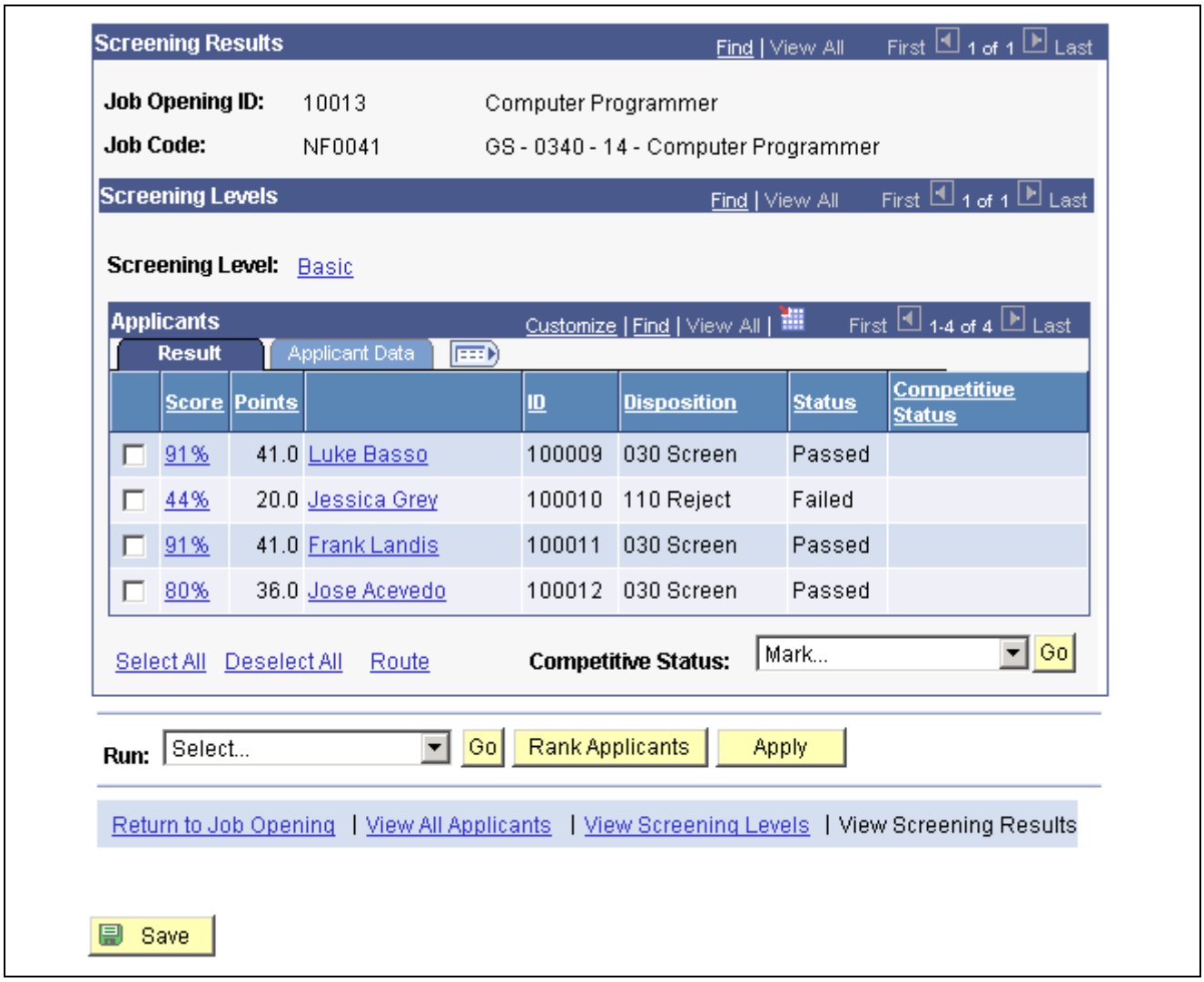
Rate Click the Rate link to access the Screen Applicants - Rate Applicant page.

Reviewing Screening Results

Access the Job Opening - Screening Results: View Screening Results page.



Job Opening - Screening Results: View Screening Results page (1 of 2)



Job Opening - Screening Results: View Screening Results page (2 of 2)

Note. When multiple job codes are defined on the job opening, the Screening Results group box has multiple scroll levels, allowing each job code to be viewed after processing a given screening level. When a screening level is processed, it runs against all job codes that have screening criteria defined.

Run Select the screening definition you want to run.

Go Click to run the screening definition selected in the Run field.

(USF) Rank Applicants Click to access the Screening Applicants - (USF) Rank Applicants page.

Screening Levels

Screening Level Click the screening level name link to access the Screening Levels - Screening Criteria page.

Applicants

Displays the screening results for each applicant linked to the job opening.

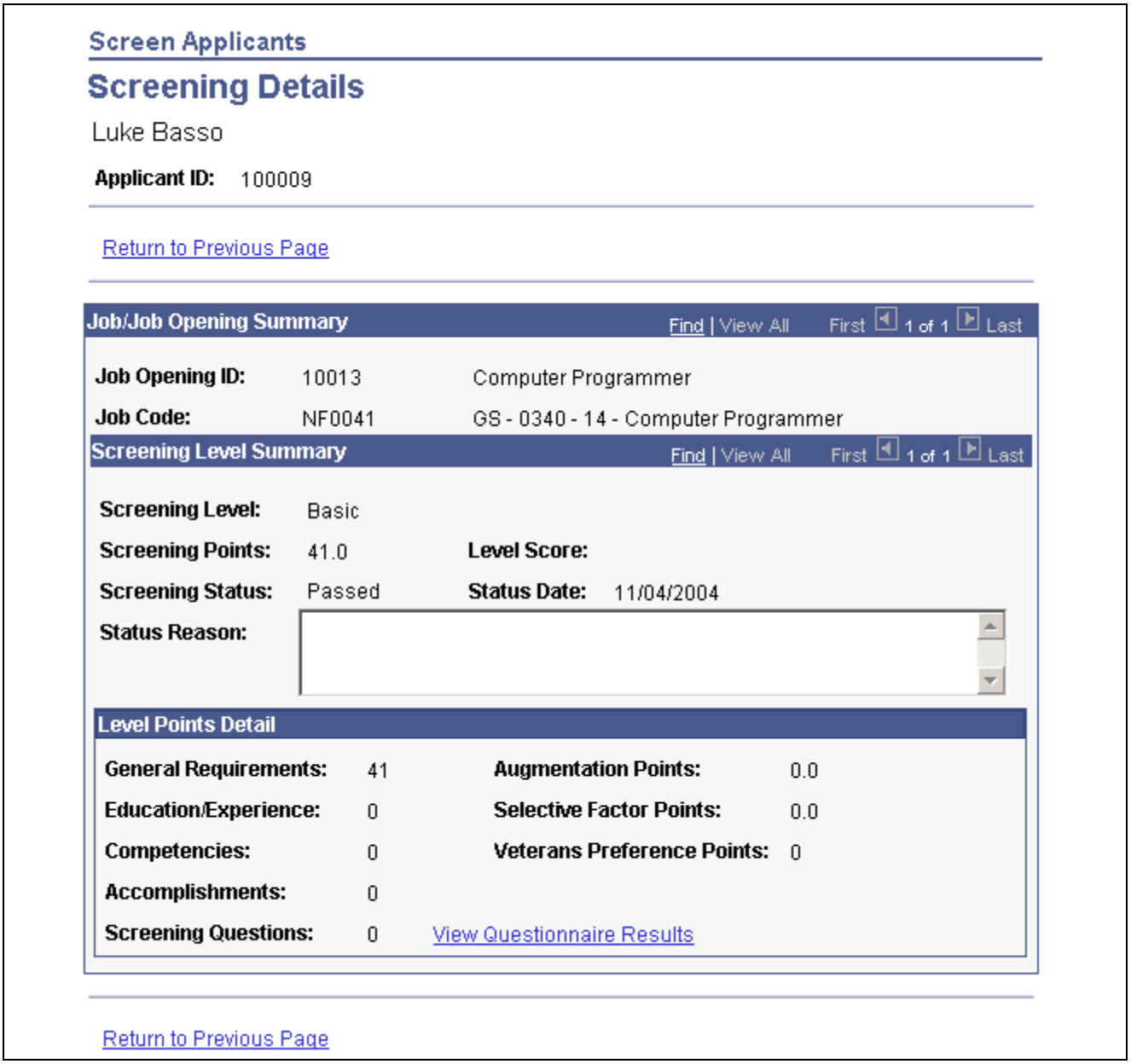
Score Click the score percentage link to access the Screening Details page.

Route Displays the Route Applicants - Route Applicants page.

See Chapter 11, "Screening and Routing Applicants," Routing Applicants, page 272.

Reviewing Scoring Details

Access the Screening Applicants - Screening Details page.



Screen Applicants - Screening Details page

This page provides the details behind the applicant's screening results and score. Click the View Questionnaire Results link to access the applicant's answers to the questionnaire that they completed.

(USF) Assigning Competitive and Noncompetitive Statuses to Applicants

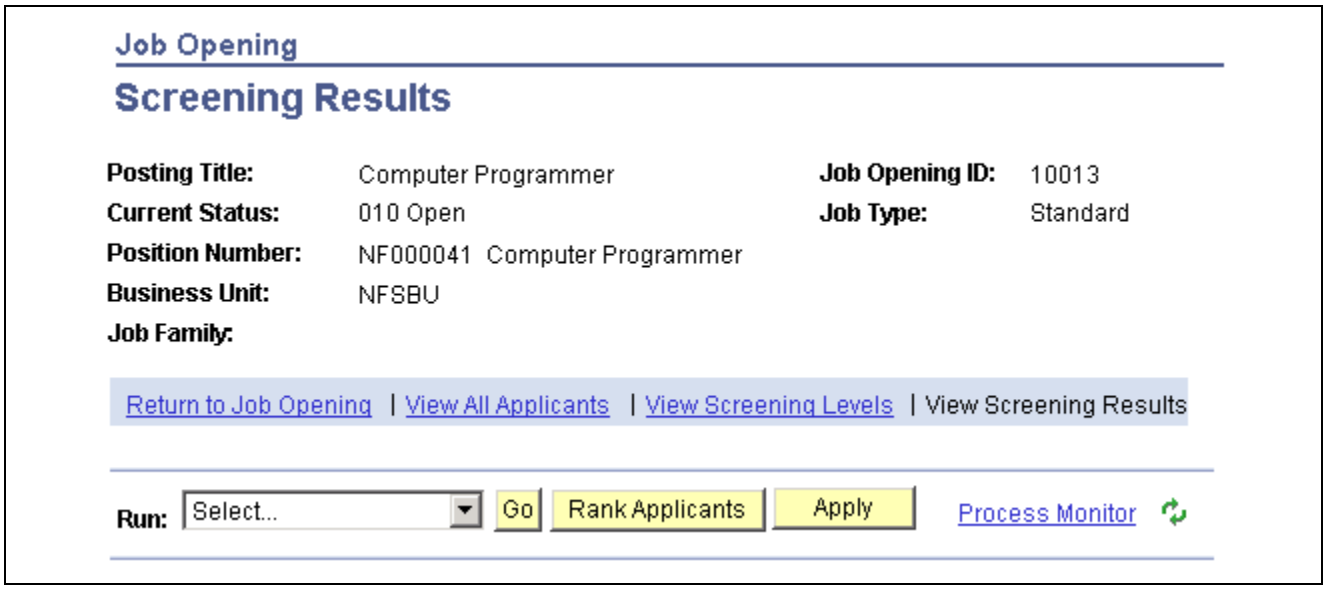
This section discusses how to assign competitive and noncompetitive statuses.

Pages Used to Assign Competitive and Noncompetitive Statuses to Applicants

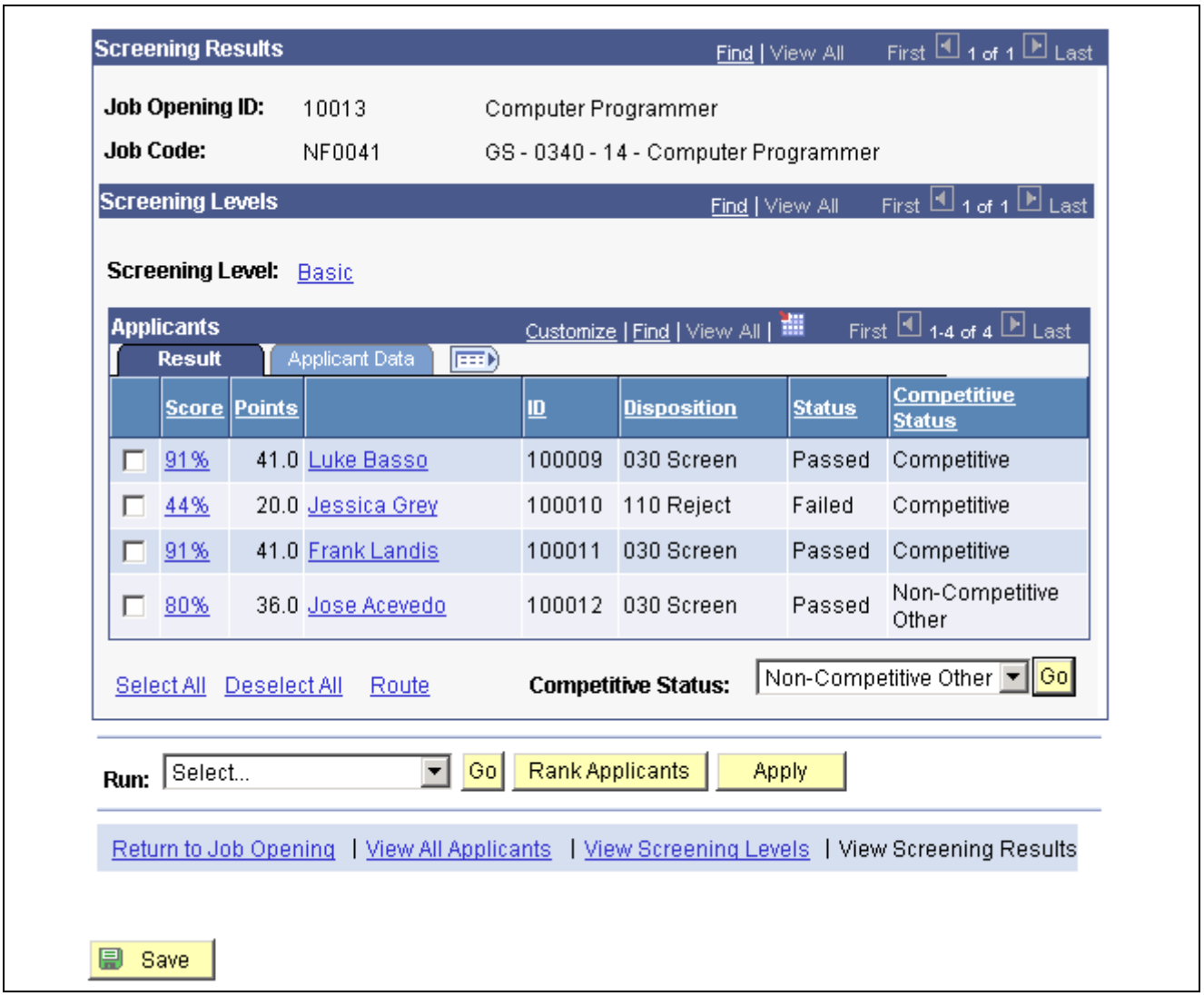
Page Name	Object Name	Navigation	Usage
Find Job Openings	HRS_JO_FIND_JOB	Recruiting, Find Job Openings, Find Job Openings	Search for job openings.
Job Opening	HRS_JO_360	Click the job title link in the Search Results group box on the Find Job Openings page.	Review job opening information and perform various tasks related to job openings.
Job Opening - Screen Applicants: View All Applicants	HRS_JO_SCR_LIST	Click the Screen Applicants link on the Job Opening page.	Review screening information and perform various tasks related to screening.
Job Opening - Screening Results	HRS_JO_SCR_RSLT	Click the View Screening Results link on the Job Opening - Screen Applicants: View All Applicants page.	Review screening results and assign competitive and non competitive statuses.

Assigning Competitive and Noncompetitive Statuses

Access the Job Opening - Screening Results: View Screening Results page.



Job Opening - Screening Results: View Screening Results (1 of 2)



Job Opening - Screening Results: View Screening Results (2 of 2)

Run Select the screening definition you want to run.

Go Click to run the screening definition selected in the Run field.

Rank Applicants Click to access the Screening Applicants - Rank Applicants page.

Screening Levels

Screening Level Displays the name of the screening level for which the results are given. Click this link to access Screening Levels - Screening Criteria page.

Applicants

To assign competitive and noncompetitive status to an applicant, select the check box next to the applicant name, select the appropriate status in the Competitive Status field, and click Go.

Score Displays the percent the applicant has achieved as a result of running the screening levels.

Points	Displays the points the applicant has received as a result of running the screening levels.
Applicant Name Link	Click the applicant name link to access the Manage Applicant page.
Disposition	Displays the disposition for the applicant.
Status	Displays whether the applicant has passed or failed screening levels.
Competitive Status	Displays the assigned competitive status.

(USF) Ranking Applicants

This section provides an overview of how to rank applicants, list a prerequisite, and discusses how to rank applicants.

Understanding How to Rank Applicants

Using the Screen Applicants - Rank Applicants page, use these steps to rank applicants:

1. Define the natural breaks in the rating score and apply to competitive and noncompetitive candidates.
2. If any candidates have the same score, apply a tie-breaker method.
3. Adjust the ranking, if necessary.
4. Run the process to create the Certificate of Eligibles.

The system looks at the ranking that is assigned to the screening template and ranks the applicants according to that criteria.

Following is used to determine the ranking status:

- Category 1: Qualified/Well-Qualified/Best Qualified Preference Eligibles with “Must Select” for the given recruiting type.
- Category 2: Well-Qualified/ Best-Qualified Preference Eligibles with “Must Consider” for the given recruiting type.
- Category 3: Best-Qualified Non-Preference Eligibles with an effect of “None” for the given recruiting type.
- Category 4: Qualified/ Well-Qualified Non-Preference Eligibles or Qualified/Well-Qualified Preference Eligibles with an effect of “None” for the given recruiting type.

Prerequisite

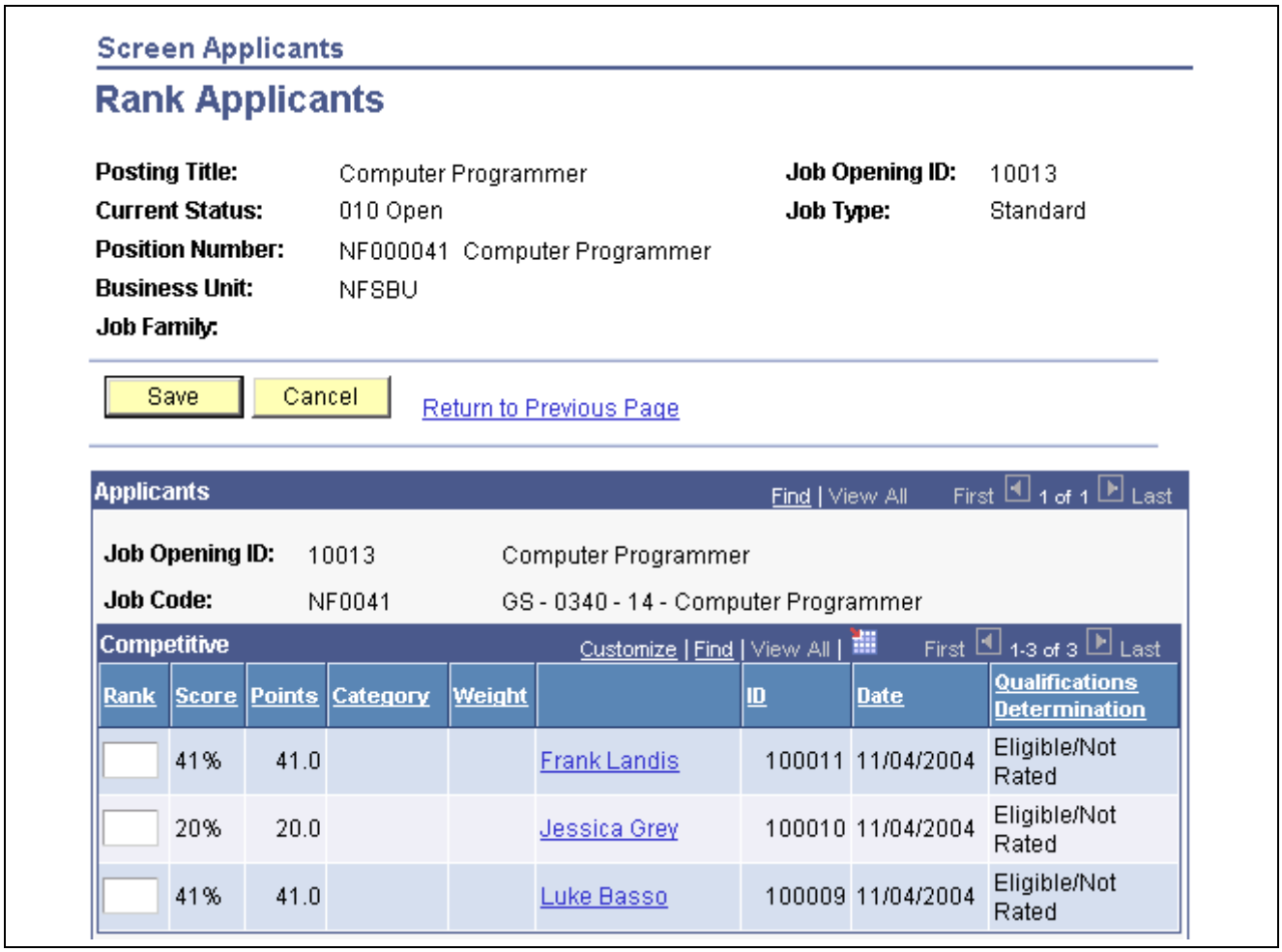
Before you can rank applicants, you must run a screening level. All defined screening levels should occur before ranking applicants so that an applicant would have been awarded all possible points first.

Pages Used to Rank Applicants

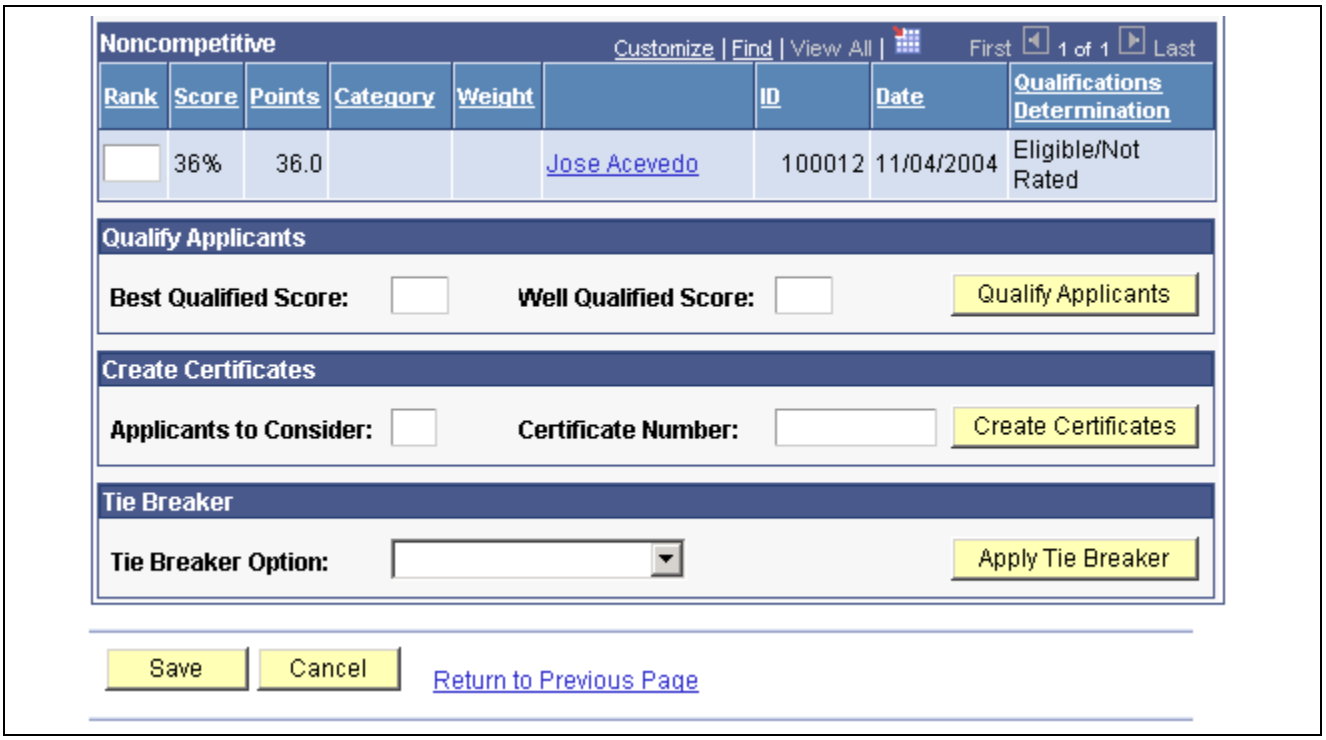
Page Name	Object Name	Navigation	Usage
Find Job Openings	HRS_JO_FIND_JOB	Recruiting, Find Job Openings, Find Job Openings	Search for job openings.
Job Opening	HRS_JO_360	Click the job title link in the Search Results group box on the Find Job Openings page.	Review job opening information and perform various tasks related to job openings.
Job Opening - Screen Applicants: View All Applicants	HRS_JO_SCR_LIST	Click the Screen Applicants link on the Job Opening page.	Review screening information and perform various tasks related to screening.
Screen Applicants - Rank Applicants	HRS_JO_RANK	Click the Rank Applicants button on the Job Opening - Screen Applicants: View All Applicants page.	Rank applicants.

Ranking Applicants

Access the Screen Applicants - Rank Applicants page.



Screen Applicants - Rank Applicants page (1 of 2)



Screen Applicants - Rank Applicants page (2 of 2)

Competitive

Displays the list of candidates that were identified as competitive during screening level processing. When entering the page for the first time, the applicants will have a Qualifications score of Eligible/Not Rated.

Rank Initially this field is blank. When you qualify the applicants the system assigned a ranking to the applicant. This field can be overridden.

Score Displays the percent of those points to the total possible accumulated points.

Points Displays the accumulated points the applicant has received in all screening levels.

Name Click the name link to access the Manage Applicant page.

Noncompetitive

Displays the list of candidates that were identified as noncompetitive during screening level processing. When entering the page for the first time, the applicants will have a Qualifications score of Eligible/Not Rated. The fields are the same as those in the Competitive group box.

Qualify Applicants

Used to define best qualified and well qualified scores, then apply to competitive and noncompetitive candidates.

Best Qualified Score Enter the minimum score that is considered best qualified.

Well Qualified Score Enter the minimum score that is considered well qualified.

Qualify Applicant Click to have the system apply the best qualified and well qualified scores to the applicants score and assign a ranking to each applicant.

This appears in the Category column of the Competitive and Noncompetitive grids. In addition, the Qualifications Determination column are updated with the appropriate status, based on the entered scores and the ranking defined for the screening criteria.

Create Certificates

This group box is used to process the Certificate of Eligibles.

Applicants to Consider Enter the number of applicants you want included in the certificate.

Certificate Number Enter the number of the certificate.

Create Certificate Click to process the certificate of eligibles.

Tie Breaker

If any of the applicants are tied, use this section to apply a tie breaker method.

Tie Breaker Option Select one of the tie breaker methods and click the Apply Tie Breaker button. Options are:

- *Augment:* Criteria identified as Augmenting on screening levels are used to break tie's between applicants.
- *Name Request:* Applicants listed on the Applicant Name Request page on the job opening are used to break tie's between applicants.
- *Random Number:* - An algorithm based on the OPM definition are used to break ties between applicants.

Routing Applicants

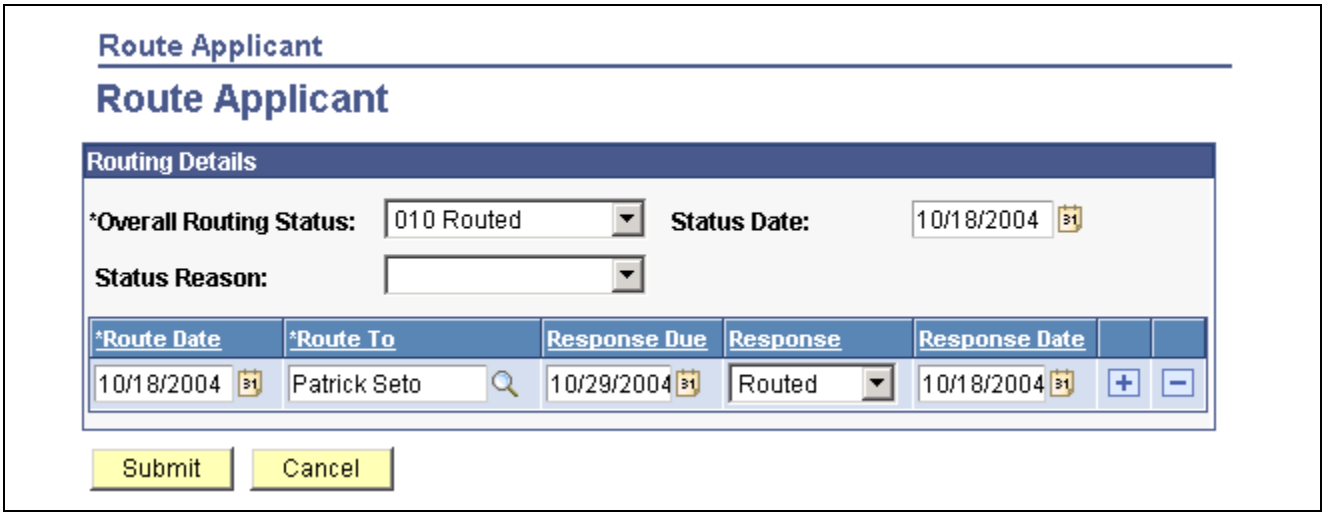
This section discusses how to route applicants.

Pages Used to Route Applicants

Page Name	Object Name	Navigation	Usage
Find Applicants	HRS_REC_SCHAPP	Recruiting, Find Applicants, Find Applicants	Search for an applicant.
Route Applicant - Route Applicant	HRS_GACT_APP_RTE	• Select *Route Applicant* in the Take Action drop-down list box for the applicant in the Search Results group box that you want to route. • Select the check box next to one or more applicants in the Search Result group box on the Find Applicants page and then select *Route Applicant* in the Group Action drop-down list box.	Route an applicant to another employee in order move the applicant to the next step in the recruiting process.

Routing Applicants

Access the Route Applicant - Route Applicant page.



Route Applicant - Route Applicant page

Routing Details

Overall Routing Status Select a routing status. Options are:

- *Routed:* Default value.
- *Invite for Interview.*
- *Hold.*
- *Reject.*
- *Withdrawn.*

Status Date Select the date this status was assigned. The default value is the system date.

Status Reason	Select a reason for the assigned status.
Route Date	Enter the date the route was sent. The default value is the system date.
Route To	Select to whom this applicant is to be routed.
Response Due	Select the date on which the reviewer should respond with recommendation.
Response	Reviewers select a response.
Response Date	Reviewers enter the date on which that entered their response.
Submit	Send a notification (HRS_APP_RTE) to the person identified in the Route To field.

CHAPTER 12

Interviewing Applicants

This chapter describes how to:

- Schedule applicant interviews.
- Complete interview evaluations.
- Send interview evaluation reminders.
- Make final recommendations.
- Review interview schedules.

Scheduling Applicant Interviews

This section provides an overview of applicant interviews and discusses how to schedule applicant interviews.

Understanding Applicant Interviews

To schedule an interview, use the Interview Schedule page. Interviews can be scheduled at any time in the recruiting process with or without a job opening. The Interview Schedule page is accessed from:

- The Job Opening page, by selecting *Manage Interview* from the Take Action field in the Applicant group box.
- The Job Opening page, by selecting the Interview Schedule link.
- The Find Applicants page by selecting *Manage Interview* from the Take Action field in the Search Results group box.
- The Manage Applicant page, by selecting *Manage Interview* from the Take Action field in the Applicant group box.

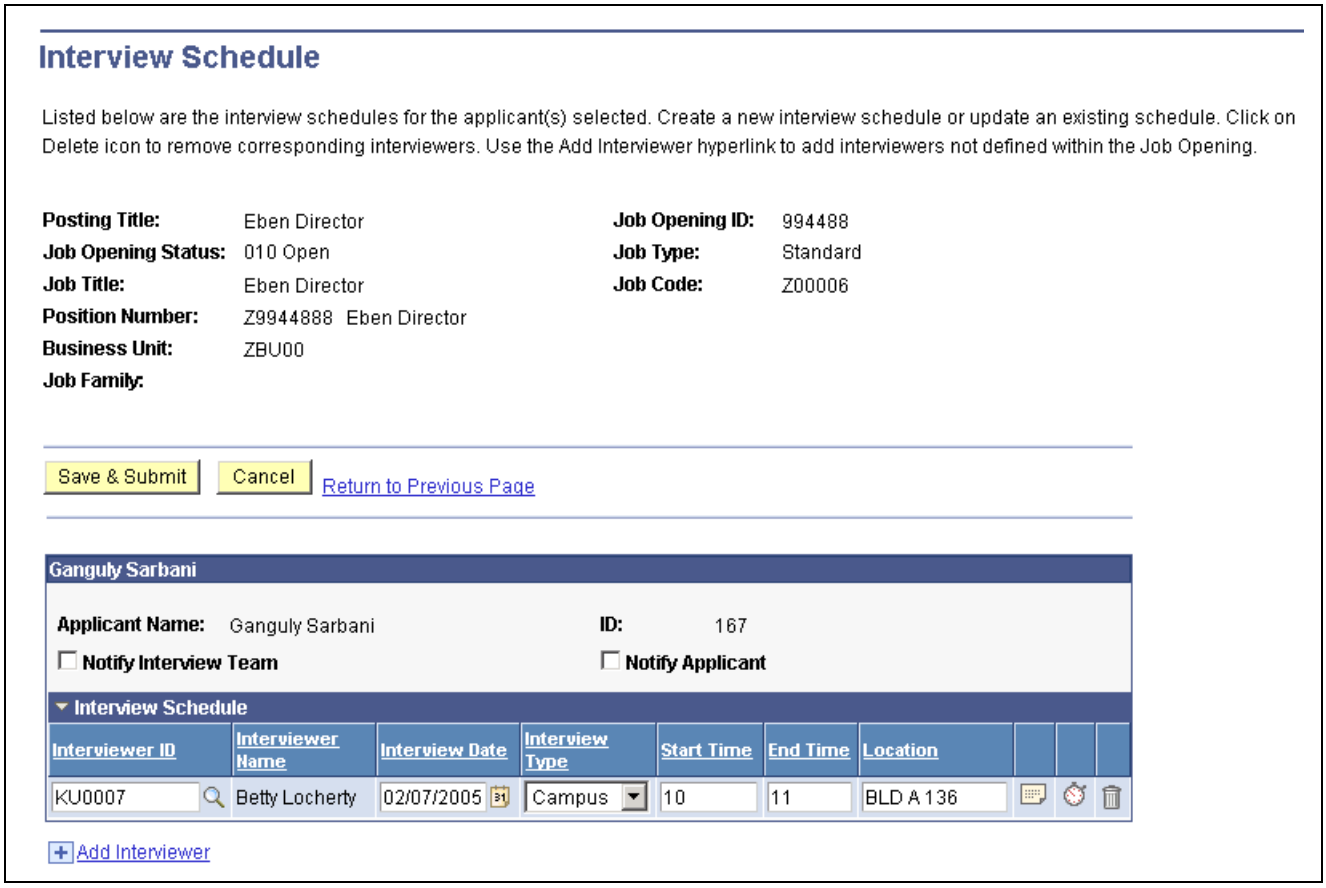
On the Interview Schedule page, you see information about the job opening, if the applicant is linked to a job opening, and the interview team members that were associated with the job opening. Complete the information relevant to scheduling the interview. You can indicate that you want the interview team and applicant notified that an interview has been scheduled.

Pages Used to Schedule Applicant Interviews

Page Name	Object Name	Navigation	Usage
Find Applicant	HRS_REC_SCHAPP	Recruiting, Find Applicants, Find Applicants	Search for and select applicants.
Interview Schedule	HRS_INT_SCHED	Select *Manage Interviews* from the Take Action field next to that the appropriate applicant and job opening row in the Search Results group box on the Find Applicants page.	Schedule applicant interviews.
Comments	HRS_RCRTR_CMTS_SP	Click the comments icon on the Interview Schedule page.	Add a comment that can be viewed by the interview team on the Interview Schedule page.
Interviewer Availability	HRS_INT_AVAIL_SP	Click the availability icon on the Interview Schedule page.	View the interviewer's current interview schedule.

Scheduling Applicant Interviews

Access the Interview Schedule page.



Interview Schedule page

Notify Interview Team Select to have an email notification (HRS_INTVW_SCHED_TEAM) sent to the members of the interview team identified on the job opening.

Notify Applicant Select to have an email notification (HRS_INTVWSCHED_APPL) sent to the applicant.

Interview Schedule

Interviewer ID Select an interviewer. The system automatically displays the members of the interview team that are associated with the job opening.

Interview Date Enter the date on which the interview is to take place.

Interview Type Select the type of interview. Define interview types on the Interview Types page.

Start Time Enter the time the interview is scheduled to begin.

End Time Enter the time the interview is scheduled to end.

Location Enter the location of the interview.

 Click to access the Comments page.

 Click to access the Interviewer Availability page, where you can view the interviewer's current interview schedule.

Completing Interview Evaluations

This section provides an overview of interview evaluations, lists a prerequisite, and discusses how to complete an interview evaluation.

Understanding Interview Evaluations

To complete an interview evaluation, you use the Interview Evaluation (HRS_INT_EVAL) component. You can access the Interview Evaluation component from:

- The Find Applicants page by selecting *Create Interview Evaluation* from the Take Action field in the Search Results group box.
- The Job Opening page by selecting *Create Interview Evaluation* from the Take Action field in the Applicants group box.
- The Manage Applicant page by selecting *Create Interview Evaluation* from the Take Action field for the appropriate job opening in the Applicant Activity group box.

Prerequisite

Before you can interview applicants, you must set up the interview evaluation definition template.

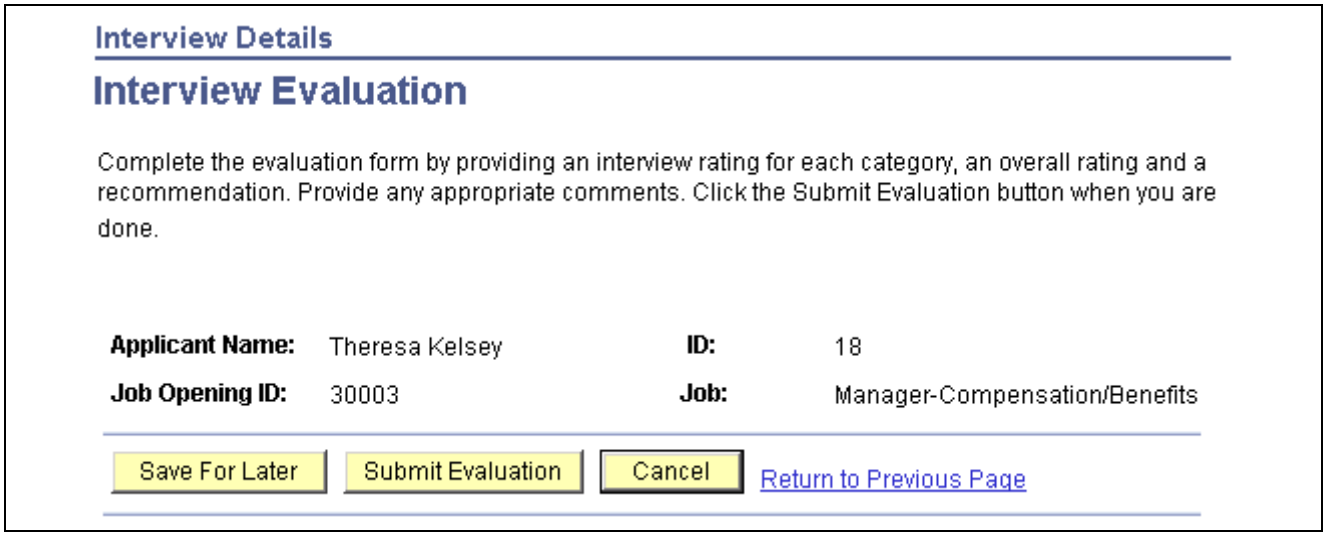
See Chapter 3, "Setting Up Recruiting Templates," Setting Up Interview Evaluation Templates, page 47.

Pages Used to Complete Interview Evaluations

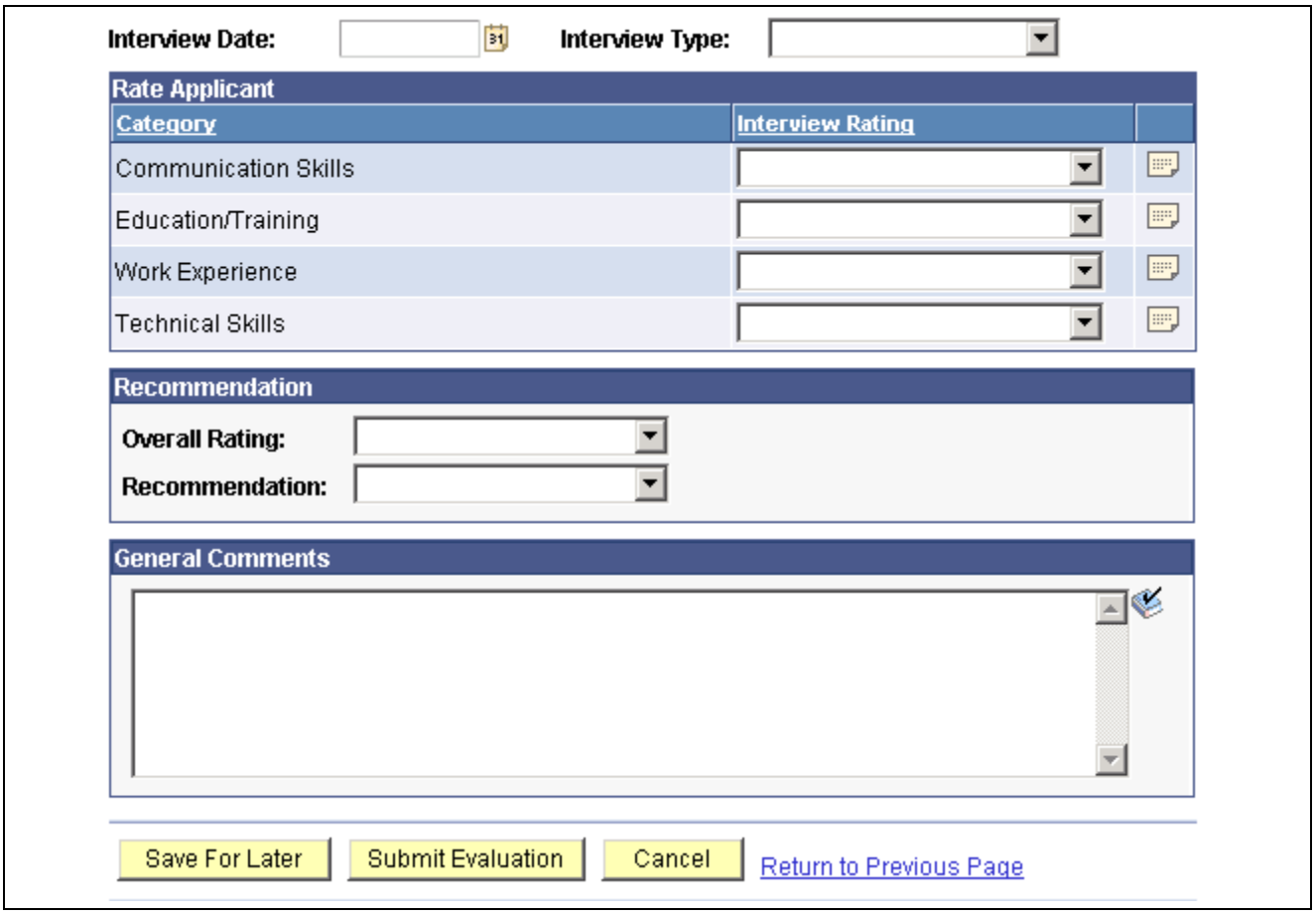
Page Name	Object Name	Navigation	Usage
Find Applicants	HRS_REC_SCHAPP	Recruiting, Find Applicant, Find Applicant	Search for and select applicants.
Interview Details - Interview Evaluation	HRS_INT_EVAL	For the person for whom you want to complete an interview evaluation, select *Create Interview Evaluation* in the Take Action field on the Find Applicants page.	Complete interview evaluation forms.
Evaluation Rating Comments	HRS_INT_EVAL_SEC	Click the Comments Link icon on the Interview Details - Interview Evaluation page.	Enter evaluation comments for a specific category.

Completing an Interview Evaluation

Access the Interview Details - Interview Evaluation page.



Interview Details - Interview Evaluation page (1 of 2)



Interview Details - Interview Evaluation page (2 of 2)

Interview Date Enter the date on which the interview was held.

Interview Level Select the level of interview.

Rate Applicant

Interview Rating Select a rating for the given category.

Click to access the Evaluation Rating Comments page and enter a comment for the specified category.

Recommendation

Overall Rating Select an overall rating.

Recommendation Select an overall recommendation.

Sending Interview Evaluation Reminders

This section provides an overview of interview evaluation reminders and discuss how to send interview evaluation reminders.

Understanding Interview Evaluation Reminders

When you run the Interview Evaluation Reminder Application Engine process (HRS_INT_EVAL), you must enter a date by which the check is run. The system sends a notification (HRS_INTVW_EVAL_RMNDR) to all those interviewers who have had their interview date passed and have not submitted an interview evaluation.

Page Used to Send Interview Evaluation Reminders

Page Name	Object Name	Navigation	Usage
Interview Evaluation Reminder	HRS_RUN_INT_REM	Recruiting, Administration, Interview Evaluation Reminder, Interview Evaluation Reminder	Send interview evaluation reminders.

Sending Interview Evaluation Reminders

Access the Interview Evaluation Reminder page.

Enter the date from which you want to run the reminders in the Interviews Scheduled From field.

Click Run to run this request. PeopleSoft Process Scheduler runs the Job Agent process at user-defined intervals.

See Also

PeopleTools 8.45 PeopleBook: Using PeopleSoft Applications

Making Final Recommendations

This section provides an overview of final recommendations, lists a prerequisite, and discusses how to make final recommendations.

Understanding Final Recommendations

Once all the interview evaluations are complete, you can make final recommendations on the applicants. To make a final recommendation, use the Manage Applicant - Disposition Details: Interview page.

To make a final recommendation, select the appropriate status and reason code. You can specify what letter you want sent to the applicant telling them of your recommendation.

Prerequisite

Before you make a final recommendation, you must have interview evaluations forms completed.

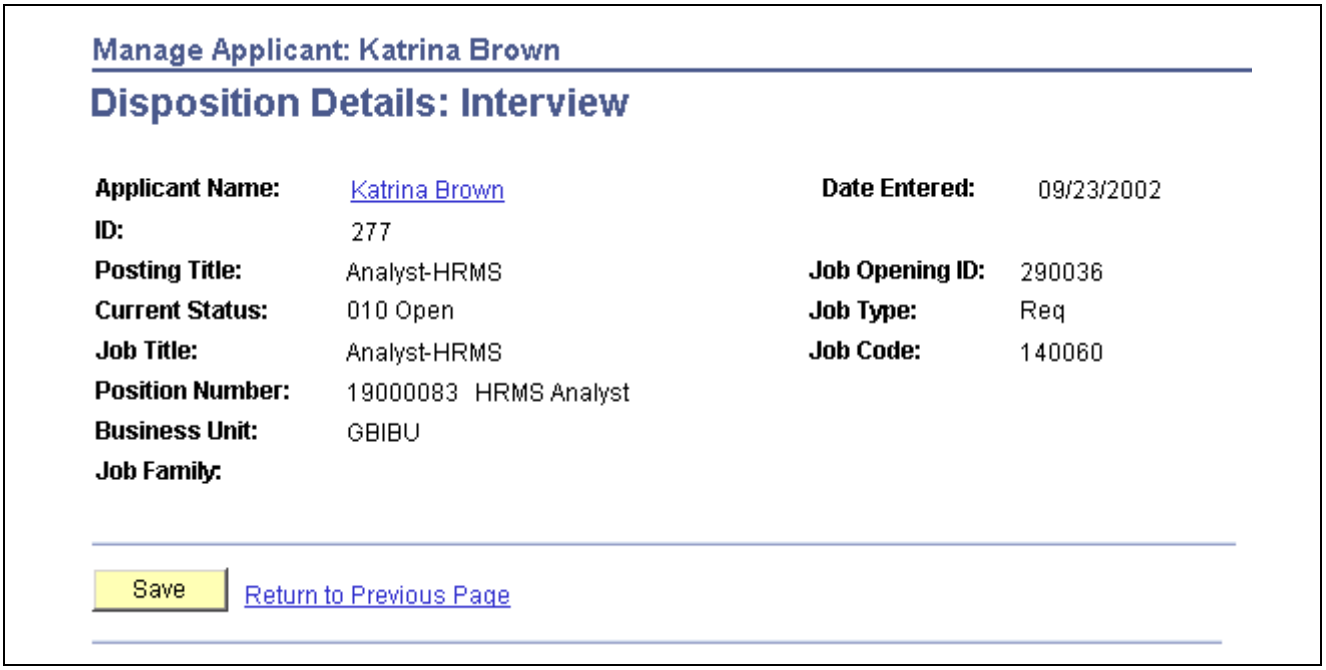
See Chapter 12, “Interviewing Applicants,” Completing Interview Evaluations, page 277.

Pages Used to Make Final Recommendations

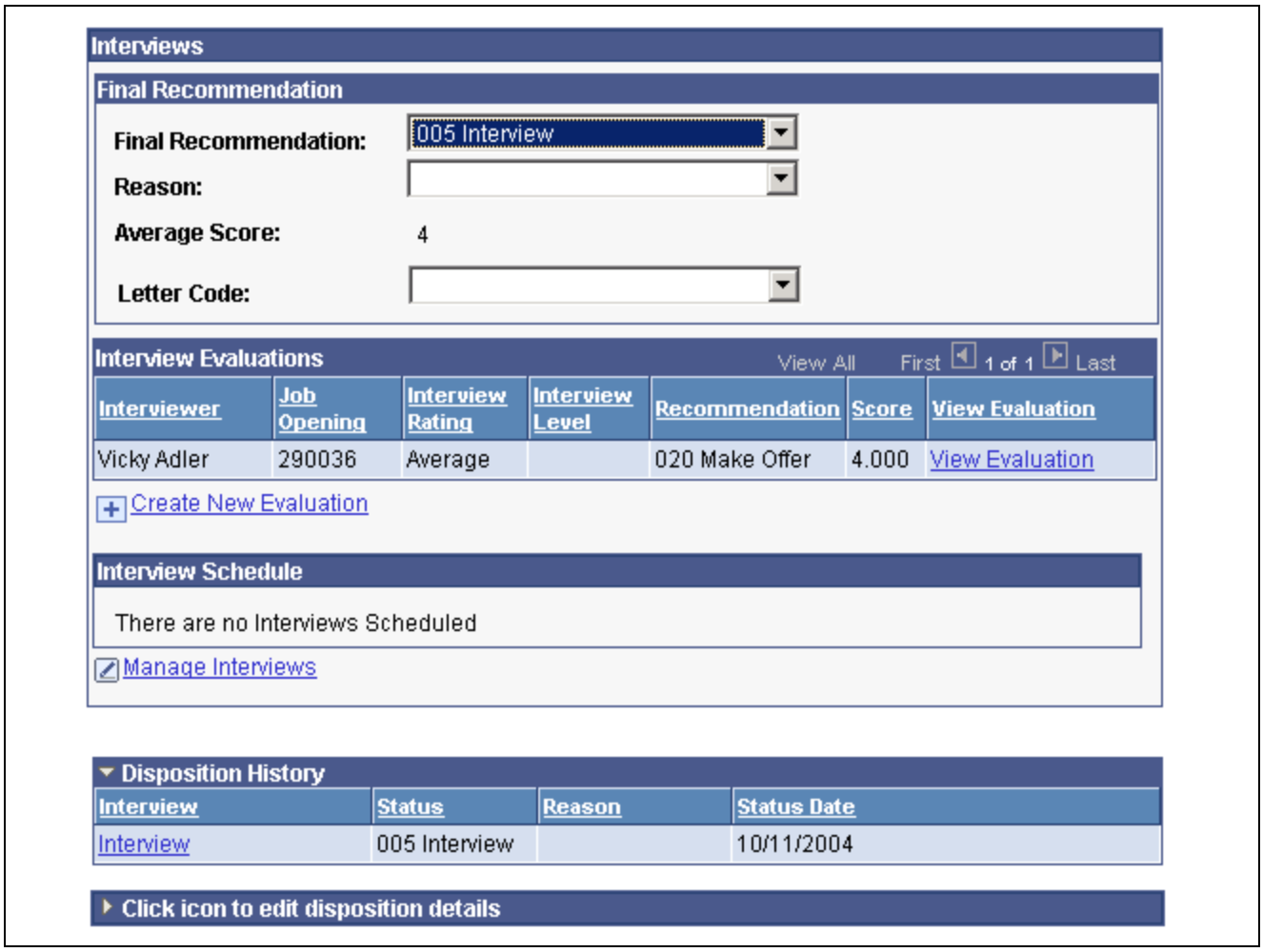
Page Name	Object Name	Navigation	Usage
Find Applicants	HRS_REC_SCHAPP	Recruiting, Find Applicants, Find Applicants	Search for and select applicants.
Manage Applicant - Disposition Details: Interview	HRS_APP_RCMNT	Click the Interview link in the Disposition column on the Find Applicants page.	Make final recommendations.

Making Final Recommendations

Access the Manage Applicant - Disposition Details: Interview page.



Manage Applicant - Disposition Details: Interview page (1 of 2)



Manage Applicant - Disposition Details: Interview page (2 of 2)

Final Recommendation

Final Recommendation Select a final recommendation.

Reason Select a reason for the final recommendation.

Letter Code Select the letter that you want sent to the applicant.

Reviewing Interview Schedules

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

- Review applicant interview schedules.
- Review interview calendars.

Understanding Interview Schedules

PeopleSoft software provides two features for reviewing interview schedules. You can:

- Review an applicant's interview schedules and evaluations by using the Manage Applicant - Applicant Activity: Interview Schedule/Evaluation page.
- Review your own interview calendars.

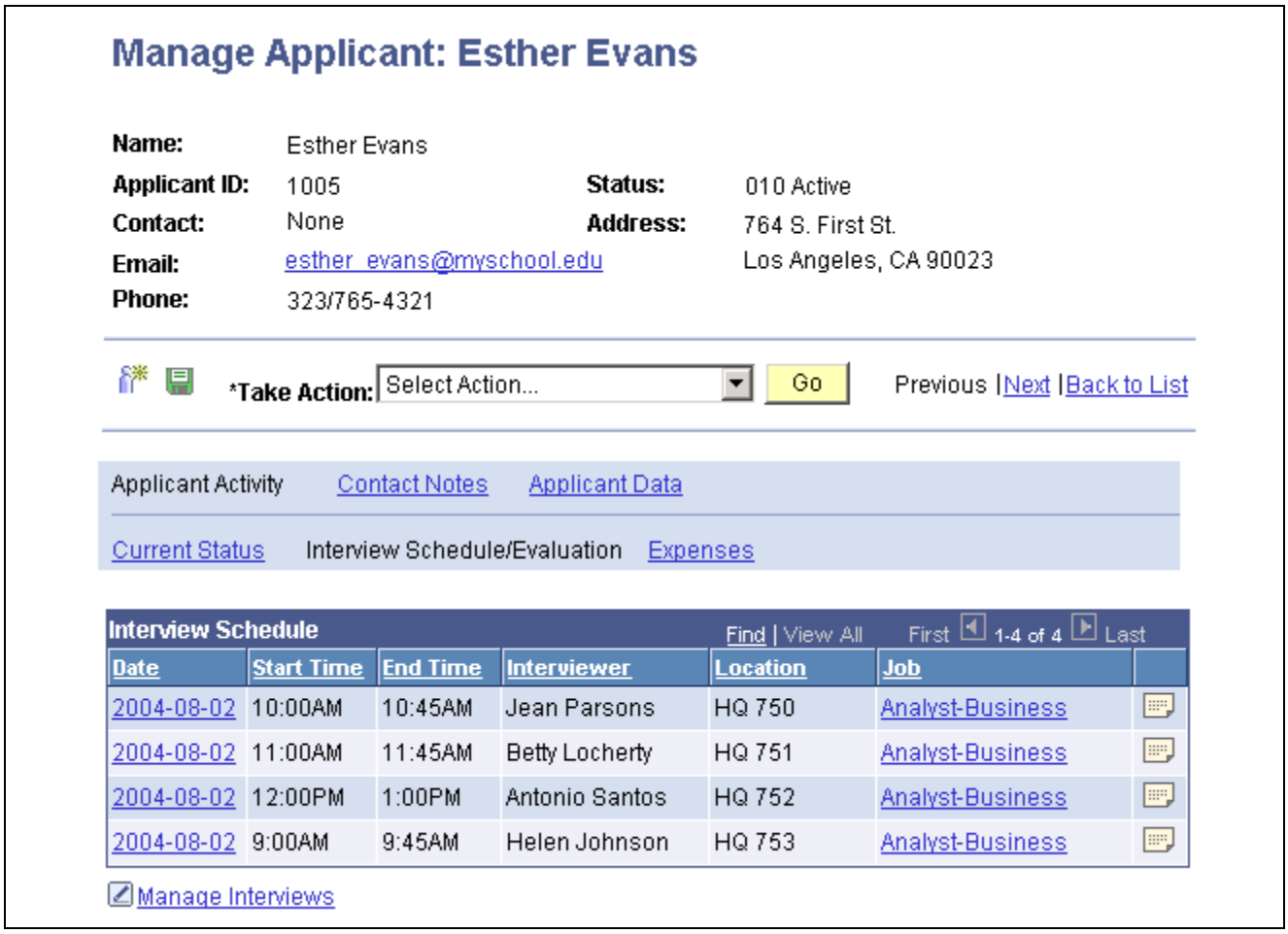
  You use the Interview Calendar page to review your own interview schedules.

Pages Used to Review Interview Schedules

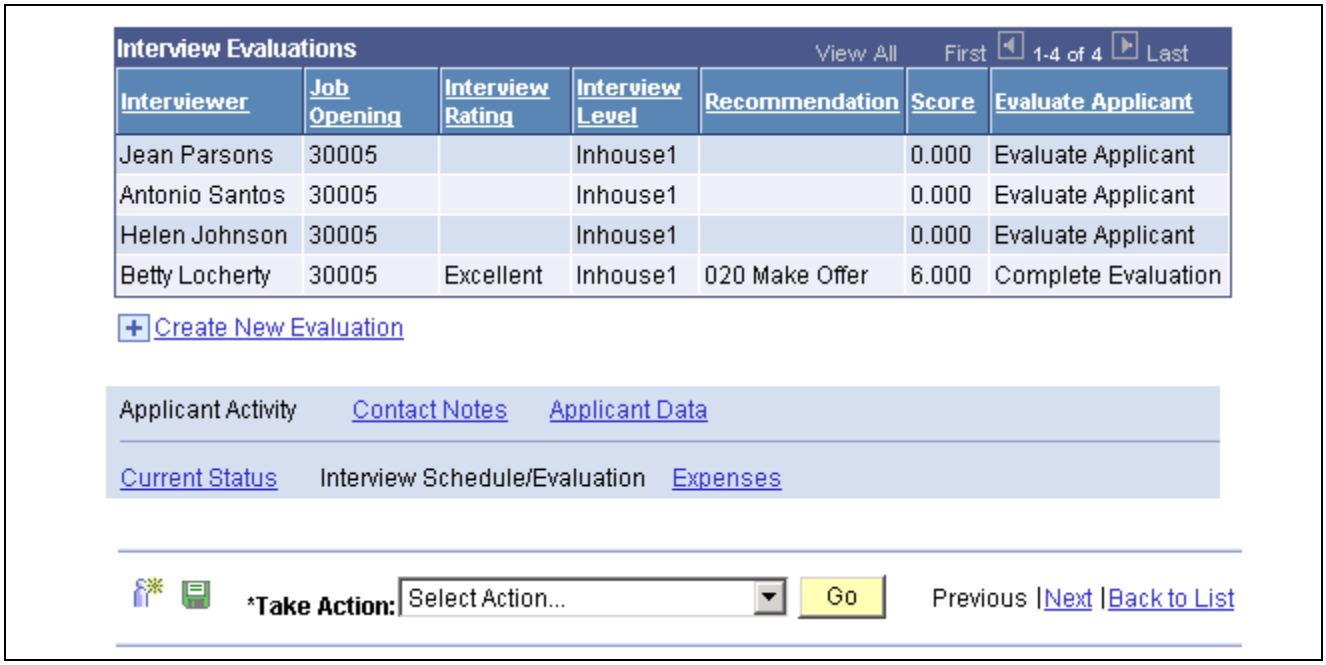
Page Name	Object Name	Navigation	Usage
Find Applicant	HRS_REC_SCHAPP	Recruiting, Find Applicant	Search for and select applicants.
Manage Applicant	HRS_MANAGE_APP	Click an applicant name link in the Search Results grid on the Find Applicants page.	Manage an applicant.
Manage Applicant - Applicant Activity: Interview Schedule/Evaluation	HRS_MANAGE_APP	Click the Applicant Activity link and then the Interview Schedule/Evaluation link on the Manage Applicant page.	Review an applicant's interview schedule and interview evaluations.
Interview Calendar	HRS_INT_CLNDR	Recruiting, Interview Calendar, Interview Calendar	Review the interview calendar for scheduled interviews to which you are associated.

Reviewing Applicant Interview Schedules

Access the Manage Applicant - Applicant Activity: Interview Schedule/Evaluation page.



Manage Applicant - Applicant Activity: Interview Schedule/Evaluation page (1 of 2)



Manage Applicant - Applicant Activity: Interview Schedule/Evaluation page (2 of 2)

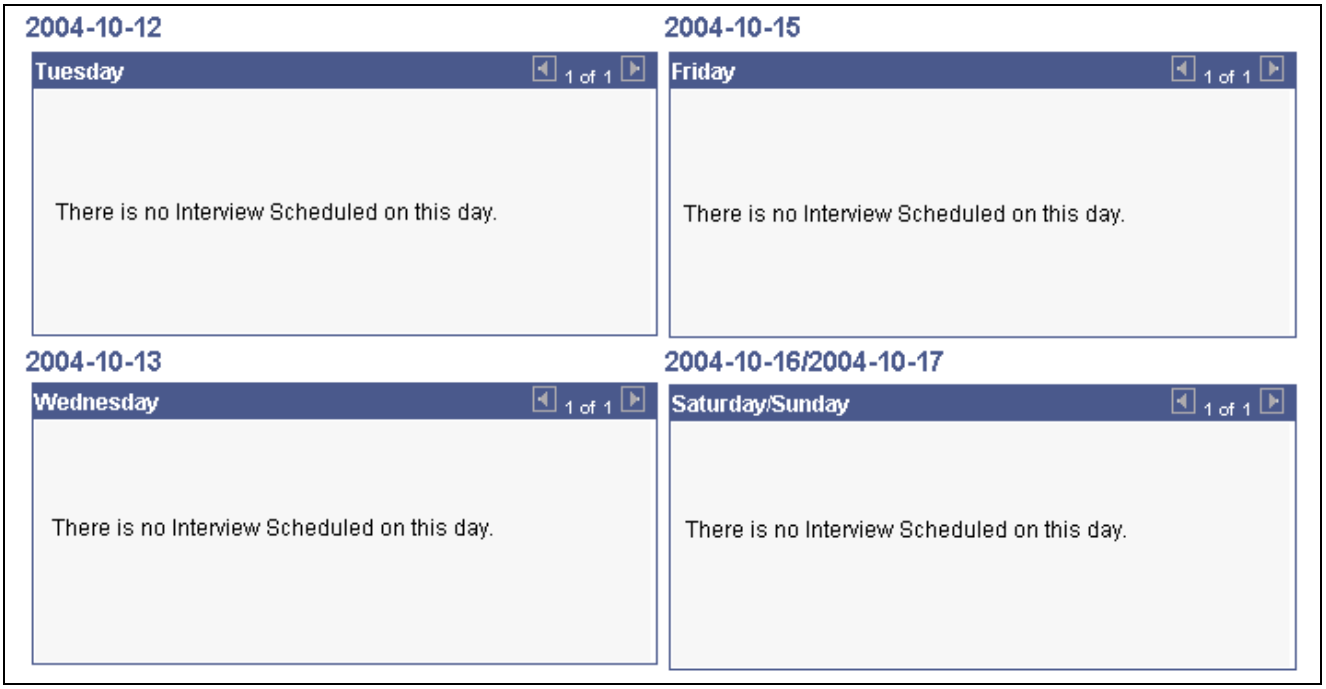
Date Click a date link to access the Interview Schedule page, where you can view and make changes to the interview schedule.

Reviewing Interview Calendars

Access the Interview Calendar page.



Interview Calendar page (1 of 2)



Interview Calendar page (2 of 2)

Display Week Of Select the week that you want to view.

Previous Week Click to change the displayed calendar to the prior week.

Next Week	Click to change the displayed calendar to the following week.

CHAPTER 13

Making Job Offers

This chapter discusses how to:

- Create job offers.
- Approve job offers.
- Edit or delete job offers.

Creating Job Offers

This section provides an overview of job offers, lists prerequisites, and discusses how to create job offers.

Understanding Job Offers

To prepare a job offer, use the Manage Applicant - Prepare Job Offer page. You can access the Manage Applicant - Prepare Job Offer page from the:

- Find Applicants page by selecting the action *Prepare Job Offer*.
- Job Opening page by clicking the applicant name link and then selecting the action *Prepare Job Offer*.

On the Prepare Job Offer page, the system displays information entered on the job opening. First, you enter the offer details such as the date the offer is created and letter you want sent to the applicant. The system automatically assigns the status for you. Next, you enter the components that make up the job offer and any comments you want attached to the job offer.

You have move on to another task before you complete the job offer, you can click Save for Later and the status is set to *Draft* so you can finish it later. When you click Submit, the system checks to see if the approval process is active, if so the offer status is set to *Pending Approval*. If approvals is not active, then the offer status is set to *Extend*.

Prerequisites

Before you prepare a job offer, you must:

1. Set up the offer component type on the Offer Component Type page.
2. Set up the offer component on the Offer Component page.
3. (Optional) Activate job offer approvals on the Recruiting Installation - Installation Options page.

See Chapter 2, “Setting Up the Recruiting Process,” Setting Up Job Offers, page 33.

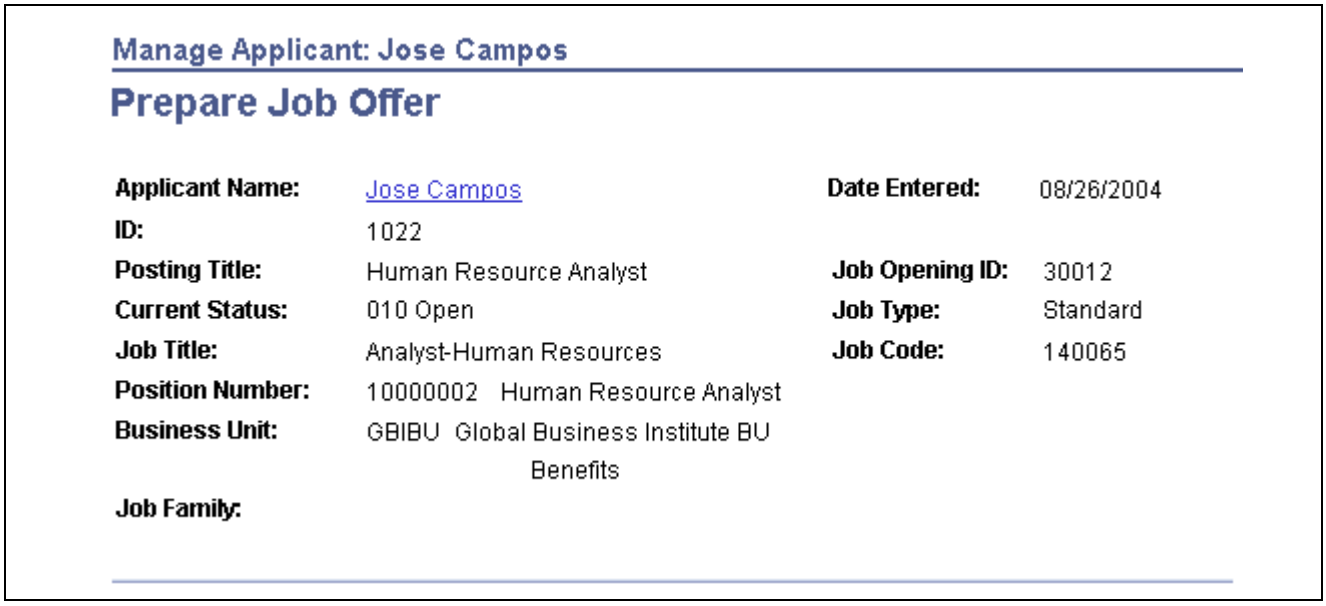
See Chapter 2, “Setting Up the Recruiting Process,” Setting Up Talent Acquisition Manager Implementation Defaults, page 6.

Pages Used to Prepare Job Offers

Page Name	Object Name	Navigation	Usage
Find Applicant	HRS_REC_SCHAPP	Recruiting, Find Applicant	Search for and select applicants.
Manage Applicant - Prepare Job Offer	HRS_APP_RCMNT	Select *Prepare Job Offer* in the Take Action field in the Search Results group box on the Find Applicants page.	Create a job offer.

Creating a Job Offer

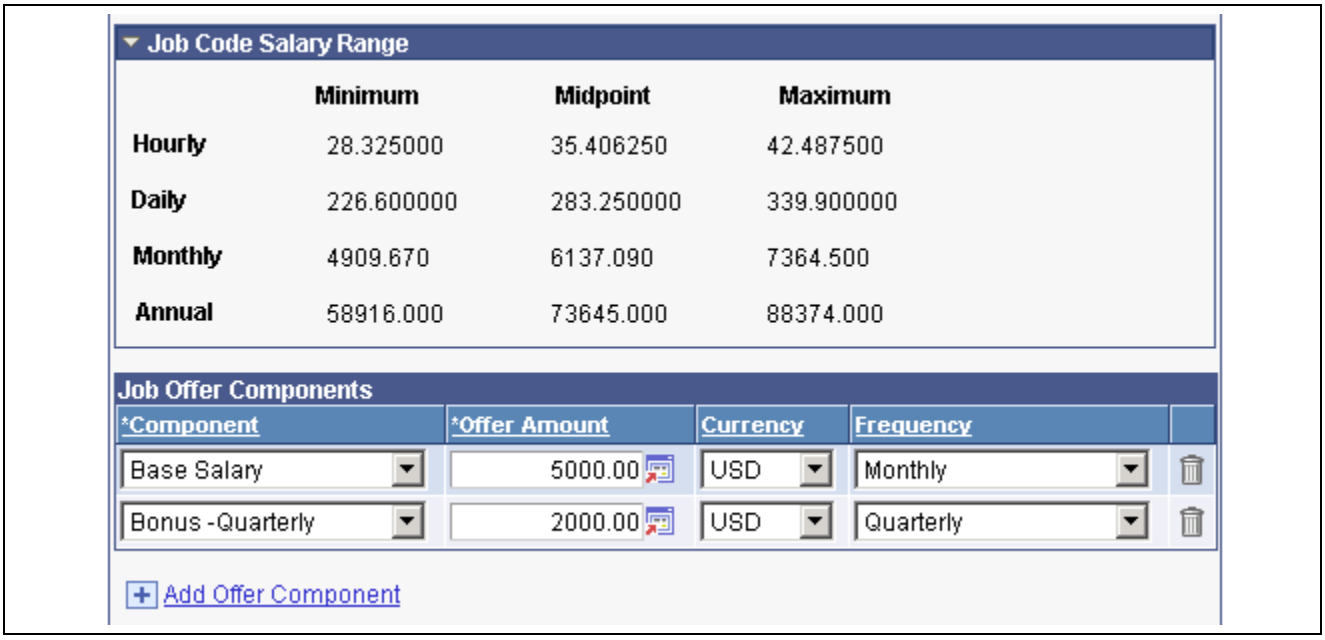
Access the Manage Applicant - Prepare Job Offer page.



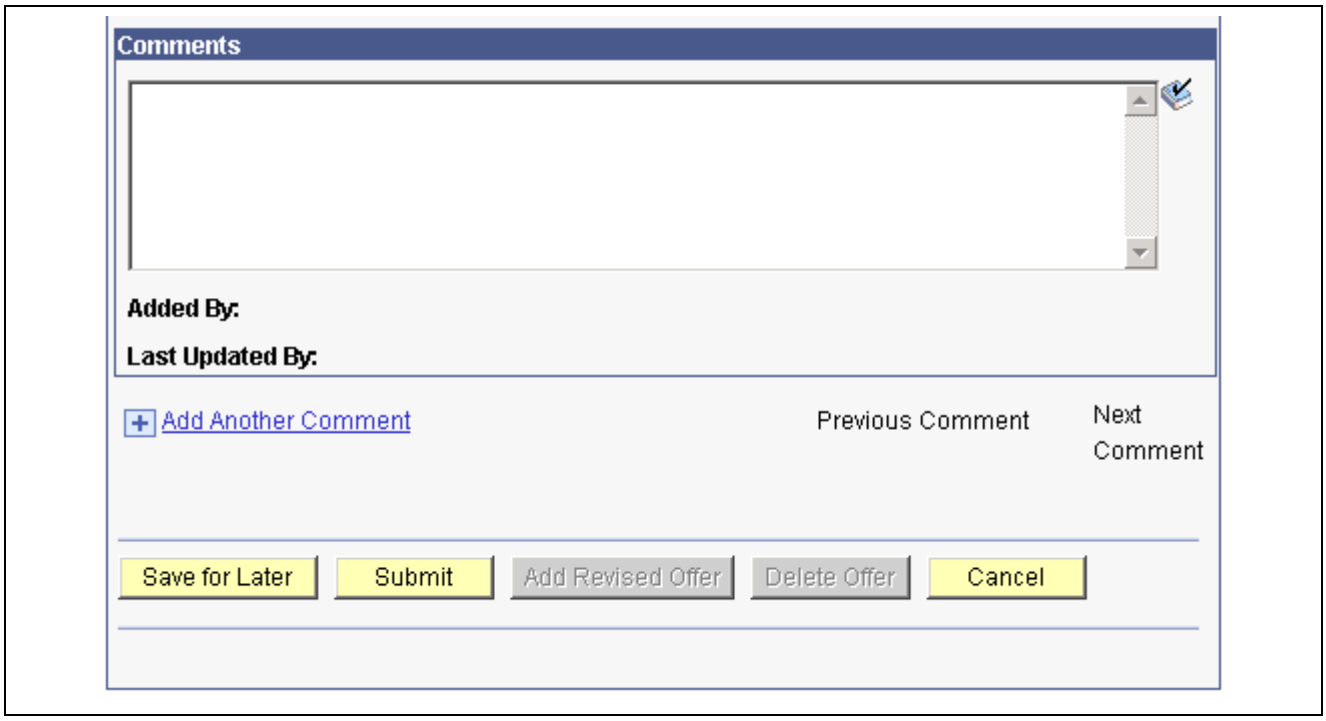
Manage Applicant - Prepare Job Offer page (1 of 4)



Manage Applicant - Prepare Job Offer page (2 of 4)



Manage Applicant - Prepare Job Offer page (3 of 4)



Manage Applicant - Prepare Job Offer page (4 of 4)

Offer Details

Job Opening Displays the name associated with the job opening.

Business Unit Displays the business unit associated with the job opening.

Position Number Displays the position number associated with the job opening.

Works Council ID Displays the works council ID associated with the job opening. This field only appears on the page if the job opening associated with the job offer has a works council section on it, or if there is no job opening associated with the job offer and the Optional Works Council option is selected on the Recruiting Installation - Installation Options page.

Job Code Displays the job code associated with the job opening.

Offer Date Enter the date the offer is effective.

Hiring Manager Displays the hiring manager associated with the job opening.

Recruiter Displays the recruiter associated with the job opening.

Letter Select a letter to send to the applicant.

Printer Displays the default printer or you can enter the name of another printer.

Generate Letter Select to immediately print the selected letter.

Status Displays the job offer status.

Reason Displays the job offer reason.

Created by Displays the originator of the job opening.

Job Code Salary Range

The system displays the salary range associated with the job opening.

Job Offer Components

You can add one or more job offer components.

Component	Select an offer component.
Offer Amount	Enter an amount. The system warns you if the amount is above or below the salary range.
Currency	Select the currency. The currency defaults to currency associated with the component.
Frequency	Select a pay frequency. The frequency defaults to the frequency associated with the component.

Comments

Enter any comments that help explain the reasons behind the job offer details.

Save for Later	Save the job offer and sets the status to *Draft*.
Submit	Saves the job offer and sets the status to *Pending Approval* if approvals is active or sets the status to *Extend* if approvals is not active.
Add Revised Offer	Add new job offer when the previous offer was rejected.
Delete Offer	Users with Recruiting Administrator privileges on the Recruiting Row Level Security page can click this button to delete the offer.

Approving Job Offers

This section provides an overview of job offer approvals, lists prerequisites, and discusses how to:

- View pending approvals.
- Approve job offers.
- Add another approver or reviewer.

See Also

Chapter 6, “Working with Approvals,” page 115

Understanding Job Offer Approvals

PeopleSoft software delivers a three-step approval process for job offers. You can modify the approval process to fit your organization’s business needs.

See Chapter 6, “Working with Approvals,” page 115.

To use the approval process for job offers, you must select the Job Offers check box in the Approvals Required group box on the Recruiting Installation - Installation Options page. If your organization uses a works council, you must also select the Optional Works Council check box in the Approvals Required group box on the Recruiting Installation - Installation Options page.

Each approver can take action on the request on the Manage Applicants - Disposition Details page, which they can access by using the link in the email notification that they receive or through the Pending Approvals component. Approvers can also add additional approvers or reviewers to an individual job offer by clicking on the Insert Approver icon on the Manage Applicants - Disposition Details page and entering information for the additional approver or reviewer on the Insert additional approver or reviewer page.

Approvers have the option of either:

- Approving the job offer.
- Denying the job offer.

  The system sets the job offer status to Denied, stops the progress of the job offer, and notifies the hiring manager. However, the originator of the job opening can later resubmit the job opening.
- Pushing back the job offer.

  The system notifies the previous approver that the job offer has been pushed back and needs his or her attention.

Note. The first approver cannot push back the job offer.

This is how the delivered three-step job offer approval process works:

1. A recruiter, also known as the originator, creates a job offer and submits it.

   The system sets the job offer status to Pending Approval. The system also identifies the first, second, and third approvers and displays the Manage Applicants - Disposition Details page that summarizes who is in the three-step approval process.
2. The system notifies the first approver.

   If there is a job opening tied to the job offer, the first approver is the supervisor of the person entered as the primary hiring manager on the Job Opening page. If there isn't a job opening tied to the job offer, you can enter the hiring manager on the Manage Applicant - Prepare Job Offer page when you create the job offer. If there is more than one hiring manager and none is marked as primary, or if there is no hiring manager, then the first approval step is skipped. To identify the supervisor of the hiring manager, the system uses the Target Information page.

   See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up and Working with Self-Service Transactions," Setting Up Access to Direct Reports Data.
3. If the first approver approves the job offer, the system notifies the second approver.

   If there is a works council ID tied to the job offer, the second approver is the spokesperson or spokespersons associated with that works council ID. The works council spokesperson is the person specified in the Spokesperson field on the Works Council Table page for the works council ID associated to the job opening.

   See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Labor Administration*, "Setting Up Works Councils".

   If there isn't a works council ID tied to the job offer, or if there is no one entered in theSpokesperson field, the system skips this approval step.
4. If the second approver approves the job offer, the system notifies the third approver.

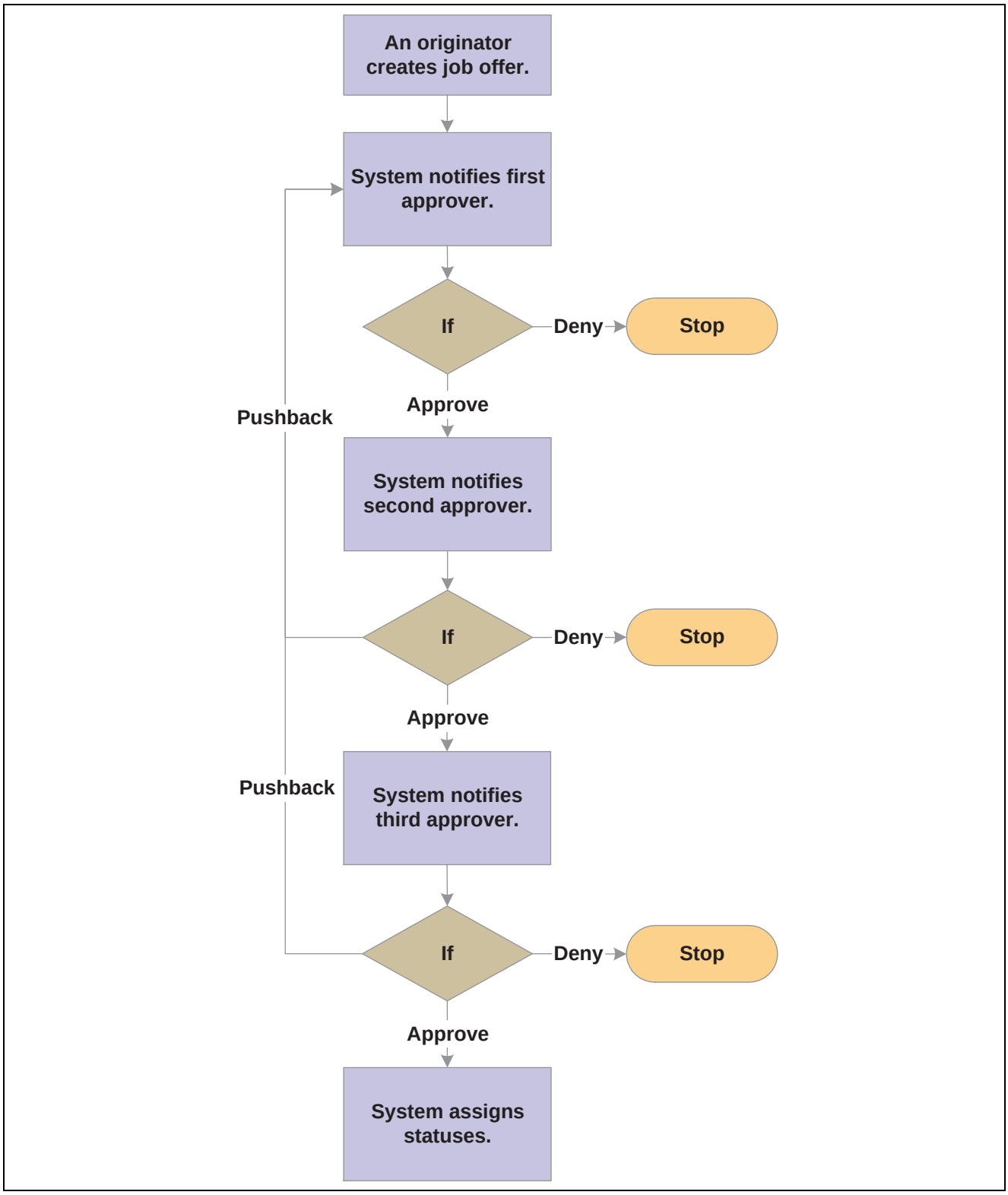
The third approver is the recruiter or recruiters entered on the Job Opening or Manage Applicant - Prepare Job Offer page. If there is a job opening tied to the job offer, the third approver is the person or persons entered as the recruiter on the Job Opening page. If there isn't a job opening tied to the job offer, you can enter the recruiter on the Manage Applicant - Prepare Job Offer page when you create the job offer. When there are multiple recruiters, only one recruiter must approve the job offer. If you do not specify a recruiter, the system routes the approval request to the Recruiting Solutions Approval Administrator.

5. If the third approver approves the job offer, the system updates the status of the job offer to Extend and ends the approval process.

During the approval process, an approver can change information on the job offer itself. If certain fields are changed that might require the job offer to be evaluated again, a trigger is created and the system sends a notification back to the first approver to start the approval process over. The fields that can cause a trigger to occur are:

- Offer Component
- Offer Amount
- Offer Currency
- Offer Frequency

This diagram shows the delivered three-step job offer approval process:



Delivered three-step job offer approval process

Prerequisites

To use the works council step in the job offer approval process, you must:

1. Set up works council IDs.

   See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Labor Administration*, "Setting Up Works Councils".

2. Select the Optional Works Council option on the Recruiting Installation - Installation Options page.

   See Chapter 2, "Setting Up the Recruiting Process," Defining Recruiting Installation Defaults, page 6.

3. Add the Works Council Information section to job opening templates.

   See Chapter 3, "Setting Up Recruiting Templates," Setting Up Job Opening Templates, page 40.

4. Add a works council ID to job opening or job offer.

   See Chapter 8, "Creating Job Openings," Entering Job Opening Details, page 148.

   See Chapter 13, "Making Job Offers," Creating a Job Offer, page 288.

Pages Used to Approve Job Offers

Page Name	Object Name	Navigation	Usage
Pending Approvals	HRS_RECRUIT_CONSOL	Recruiting, Pending Approvals, Pending Approvals	View pending approvals and approve job offers.
Manage Applicant - Disposition Details	HRS_APP_RCMNT	Click the subject link on the Pending Approvals page.	Approve, deny, or pushback a job offer.
Insert additional approver or reviewer	NA	• Click the Insert Approver icon on the Job Opening - Job Approvals page. • Click the Insert Approver icon on the Manage Applicant - Disposition Details page.	Add approvers or reviewers to the approval process.

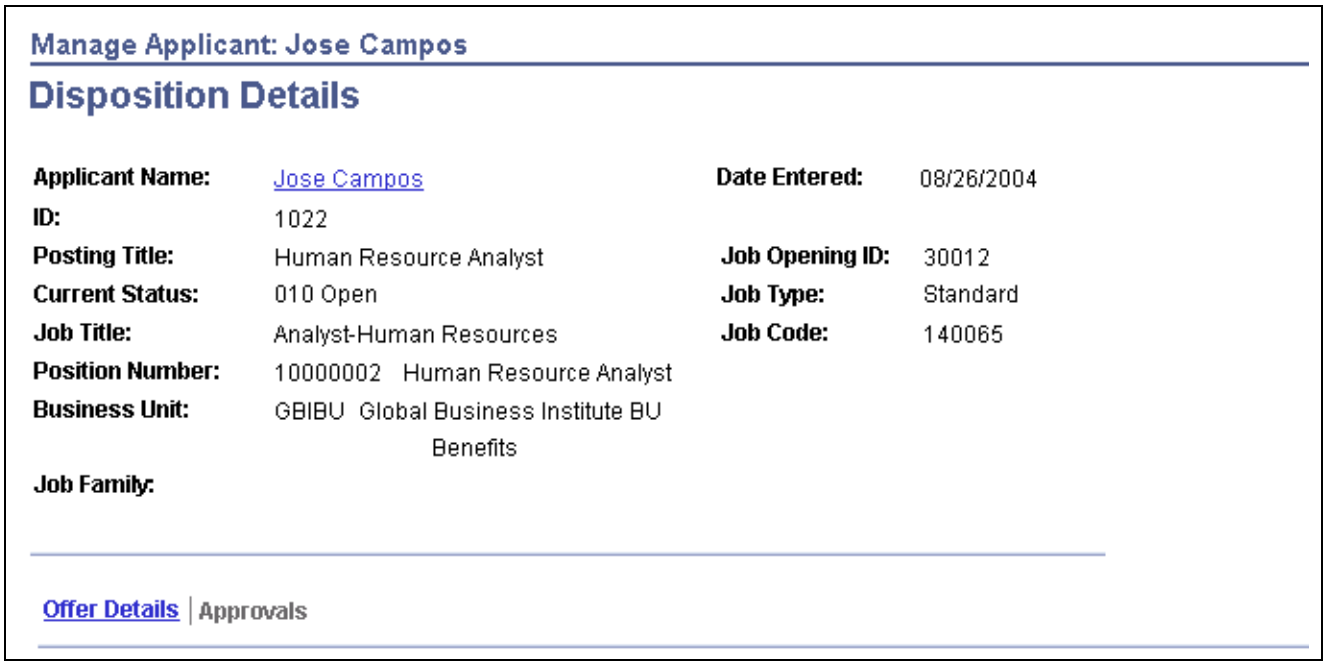
Viewing Pending Approvals

Access the Pending Approvals page.

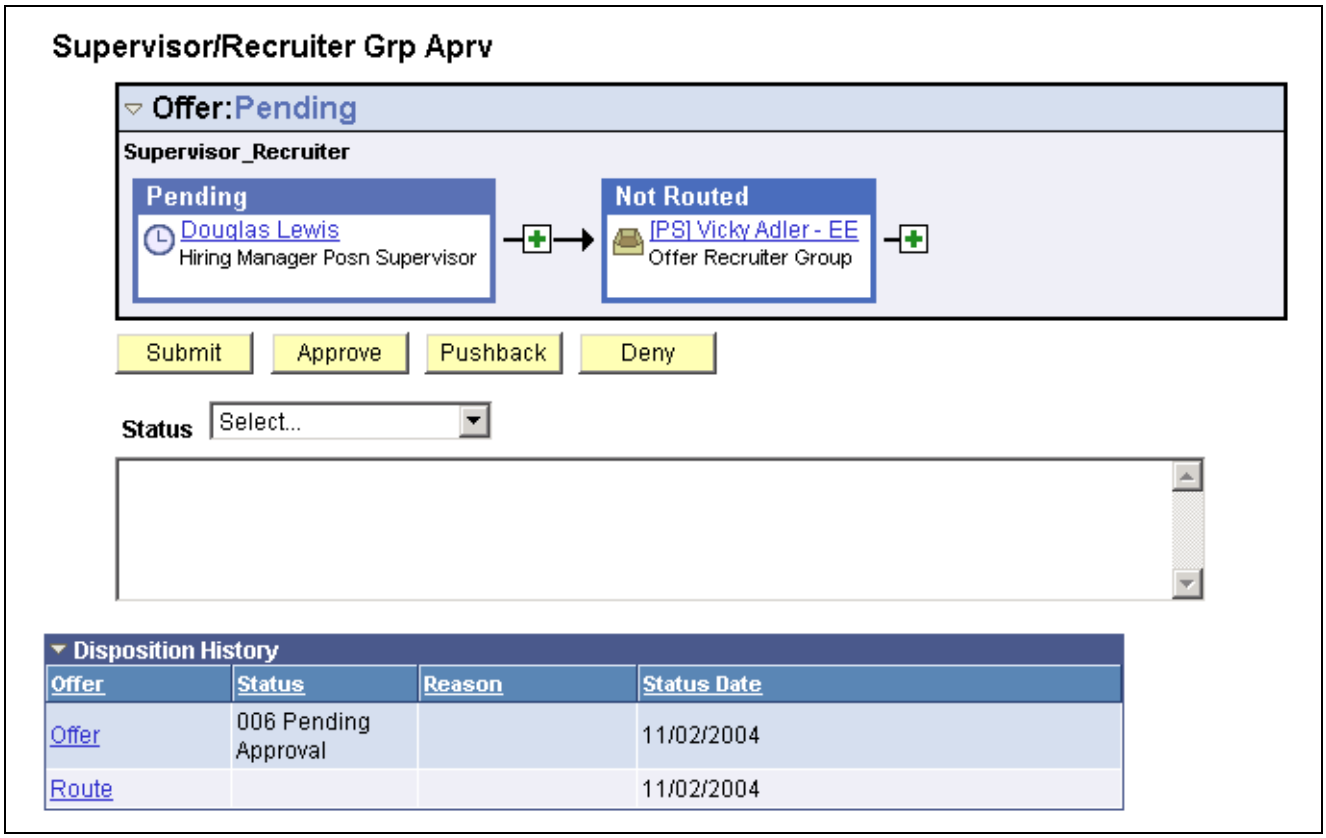
See Chapter 8, "Creating Job Openings," Viewing Pending Approvals, page 177.

Approving Job Offers

Access the Manage Applicant - Disposition Details page.



Manage Applicant - Disposition Details page (1 of 2)



Manage Applicant - Disposition Details page (2 of 2)

	Click to add another approver or reviewer. A secondary page appears, where you select a user ID and whether you are adding an *Approver* or *Reviewer*.
Submit	Click to approve the job offer.

Approve Click to approve the job offer. When final approval is reached the system changes the job offer status from *Pending Approval* to *Extend.*

Pushback Click to send a notification to the previous approver telling them the job offer needs to be changed.

Deny Click to reject the job offer and set the job offer status to *Denied*.

Adding Another Approver or Reviewer

Access the Insert additional approver or reviewer page.

See Chapter 8, "Creating Job Openings," Adding Another Approver or Reviewer, page 178.

Editing or Deleting Job Offers

This section discusses how to edit or delete job offers.

Pages Used to Edit or Delete Job Offers

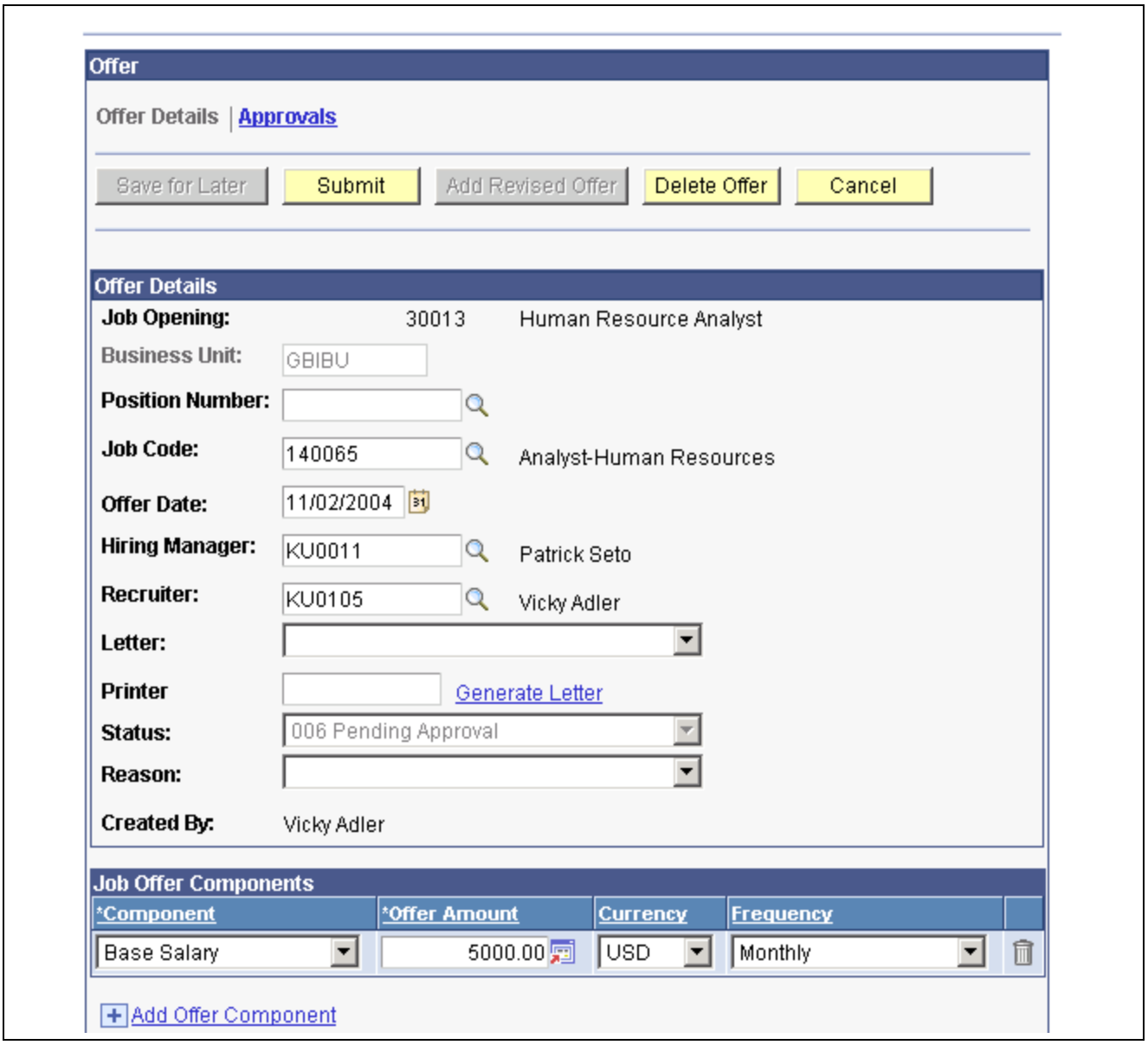
Page Name	Object Name	Navigation	Usage
Find Applicants	HRS_REC_SCHAPP	Recruiting, Find Applicants, Find Applicants	Search for and select applicants.
Manage Applicant - Disposition Details: Offer	HRS_APP_RCMNT	Click the disposition link next to the applicant name in the Results group box on the Find Applicants page.	Edit or delete the job offer. **Note.** User must first click the Edit Offer button to edit the offer.

Editing or Deleting Job Offers

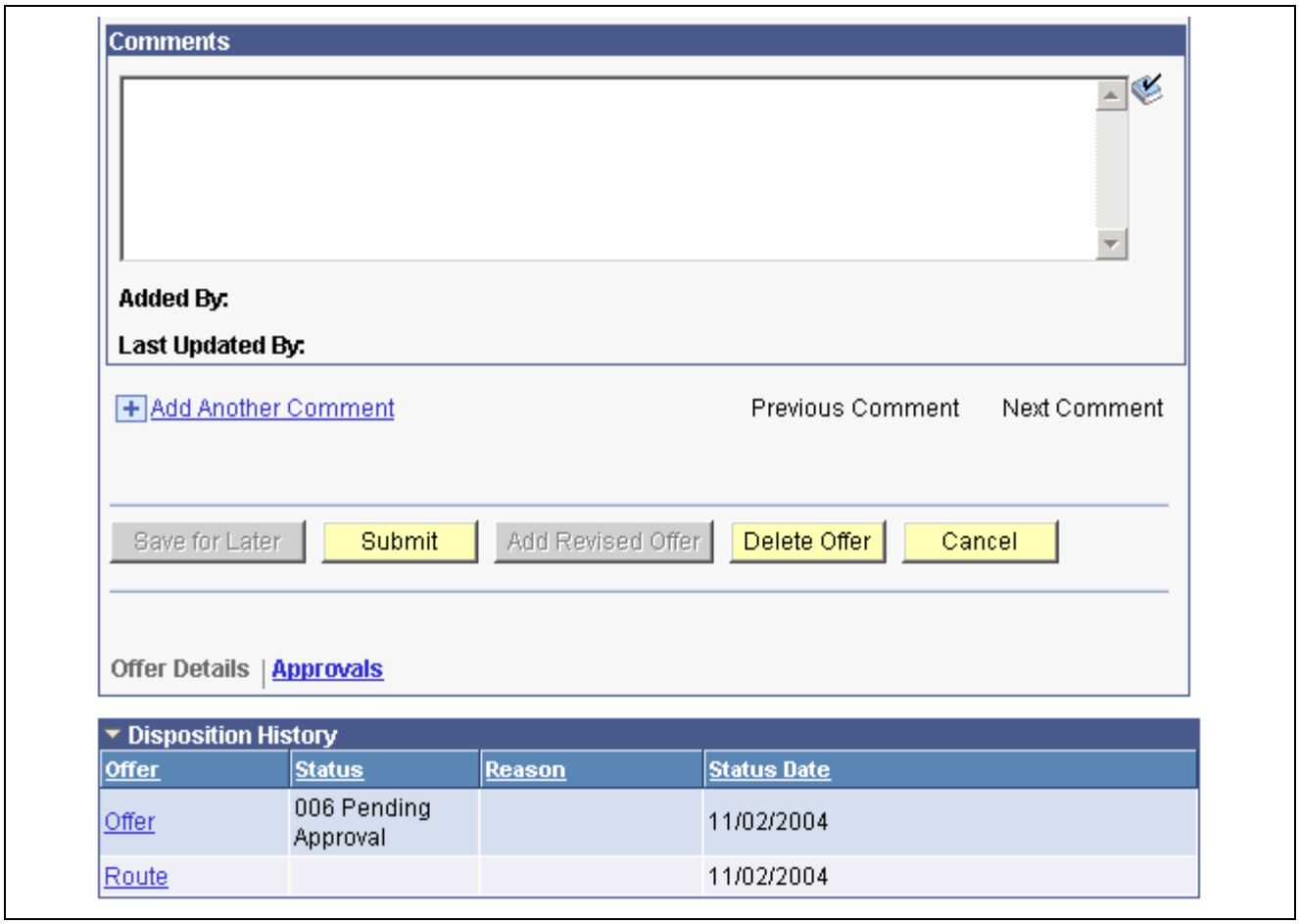
Access the Manage Applicant - Disposition Details: Offer page.



Manage Applicant - Disposition Details: Offer page (1 of 3)



Manage Applicant - Disposition Details: Offer page (2 of 3)



Manage Applicant - Disposition Details: Offer page (3 of 3)

The information that appears is the same as when you created the job offer. Update any relevant details of the job offer.

Submit Click to save and submit changes to the job offer.

Delete Offer Click to delete the job offer.

See Chapter 13, “Making Job Offers,” Creating Job Offers, page 287.

CHAPTER 14

Hiring Applicants

This chapter discusses how to:

- Complete pre-employment checks.
- Create applicant contracts.
- (AUS) Create salary packages.
- Hire applicants.
- (AUS) Copy salary packages to human resources.

Completing Pre-Employment Checks

This section provides an overview of pre-employment checks, lists a prerequisite, and discusses how to:

- Submit pre-employment check requests.
- Review pre-employment check details.

Understanding Pre-Employment Checks

Some organizations may use third-party vendors to perform pre-employment checks on applicants. When your organization sets up an agreement with a pre-employment check vendor, you nominate a recruiting administrator or recruiter as the HR manager for your organization. The HR manager has access to the administration functions to define the privileges of other users with access to the pre-employment vendor.

Prerequisite

Before you can request pre-employment checks, you must set up a vendor that performs pre-employment checks.

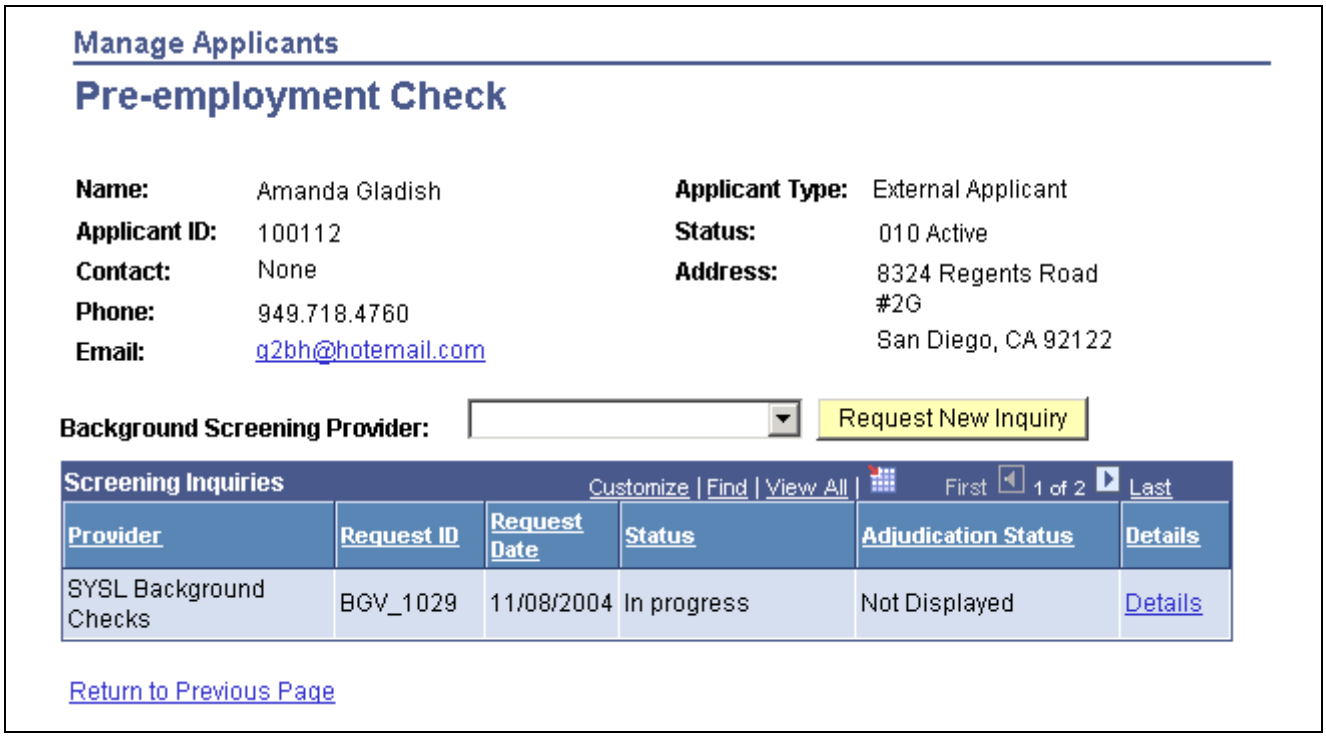
See Chapter 5, "Setting Up Third Party Integrations," page 75.

Pages Used to Complete Pre-Employment Checks

Page Name	Object Name	Navigation	Usage
Find Applicants	HRS_REC_SCHAPP	Recruiting, Find Applicants, Find Applicants	Search and select applicants.
Manage Applicant	HRS_MANAGE_APP	Click the applicant name link on the Find Applicants page.	Manage applicants.
Manage Applicants - Pre-employment Check	HRS_PREEMPL_H	Select *Pre-Employment* from the Take Action field and click Go.	Submit pre-employment check requests.
Pre-employment Check - Pre-employment Check Details	HRS_PREEMPL_D	Click the Details link in the Screening Inquiries group box on the Manage Applicants - Pre-employment Check page.	Review pre-employment check details.

Submitting Pre-Employment Check Requests

Access the Manage Applicants - Pre-employment Check page.



Manage Applicants - Pre-employment Check page

Background Screening Provider Select the provider that is to perform the background check.

Request New Inquiry Click to submit the request. The system sends a message to the vendor.

Screening Inquiries

This group box displays the summary information and status of the background check.

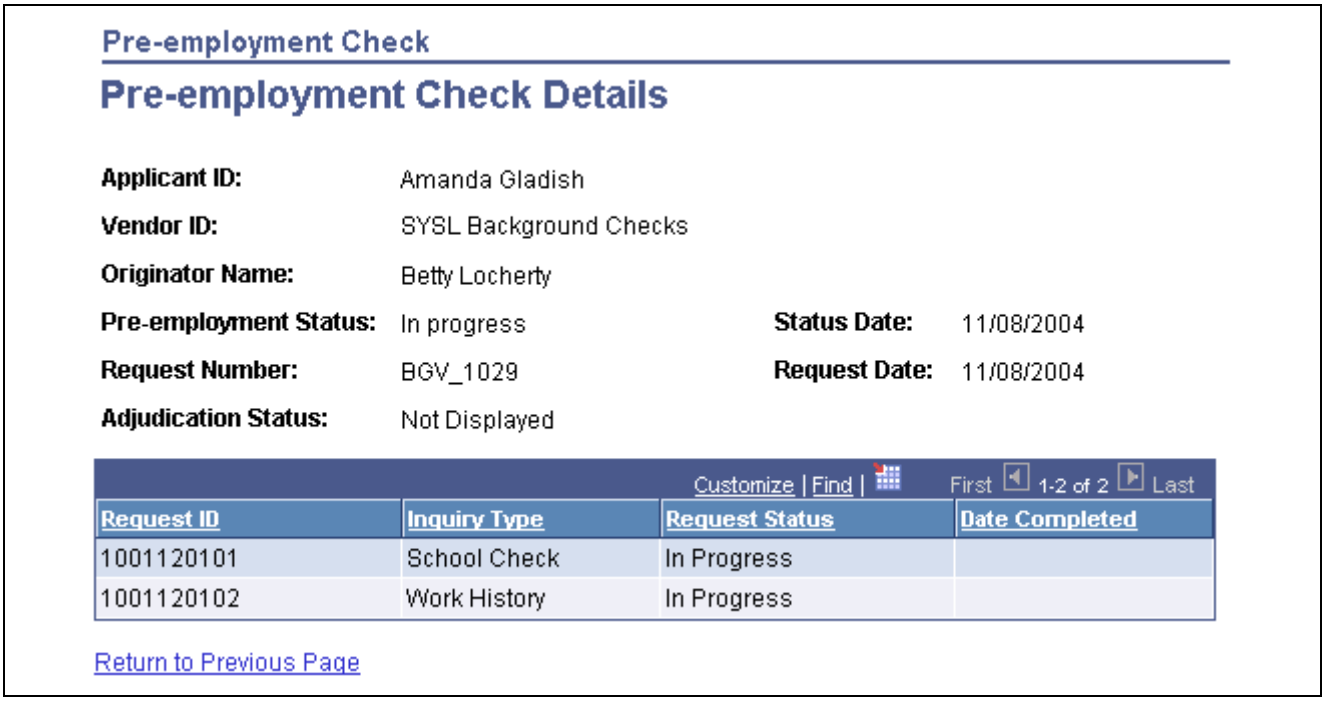
Adjudication Status Displays the status of the adjudication, if you have enabled it on the Open Integration Framework - Pre-Employment Vendor Setup page.

See Chapter 5, "Setting Up Third Party Integrations," Defining Settings for Pre-Employment Vendors, page 85.

Details Click to access the Pre-employment Check - Pre-employment Check Details page.

Reviewing Pre-employment Check Details

Access the Pre-employment Check - Pre-employment Check Details page.



Pre-employment Check - Pre-employment Check Details page

Creating Applicant Contracts

This section provides an overview of applicant contracts, lists prerequisites, and discusses how to:

- Define basic contract information.
- Define contract clause information.
- Define the signature date and probation information.

Understanding Applicant Contracts

If your organization uses employment contracts, you can use Talent Acquisition Manager to create applicant contracts and link them to an applicant during the prepare for hire process. If the employee is hired, this information is copied to the human resources database.

Prerequisites

Before you create an applicant contract, you must:

- Set up contract types.
- Set up contract clauses.
- Set up contract templates.

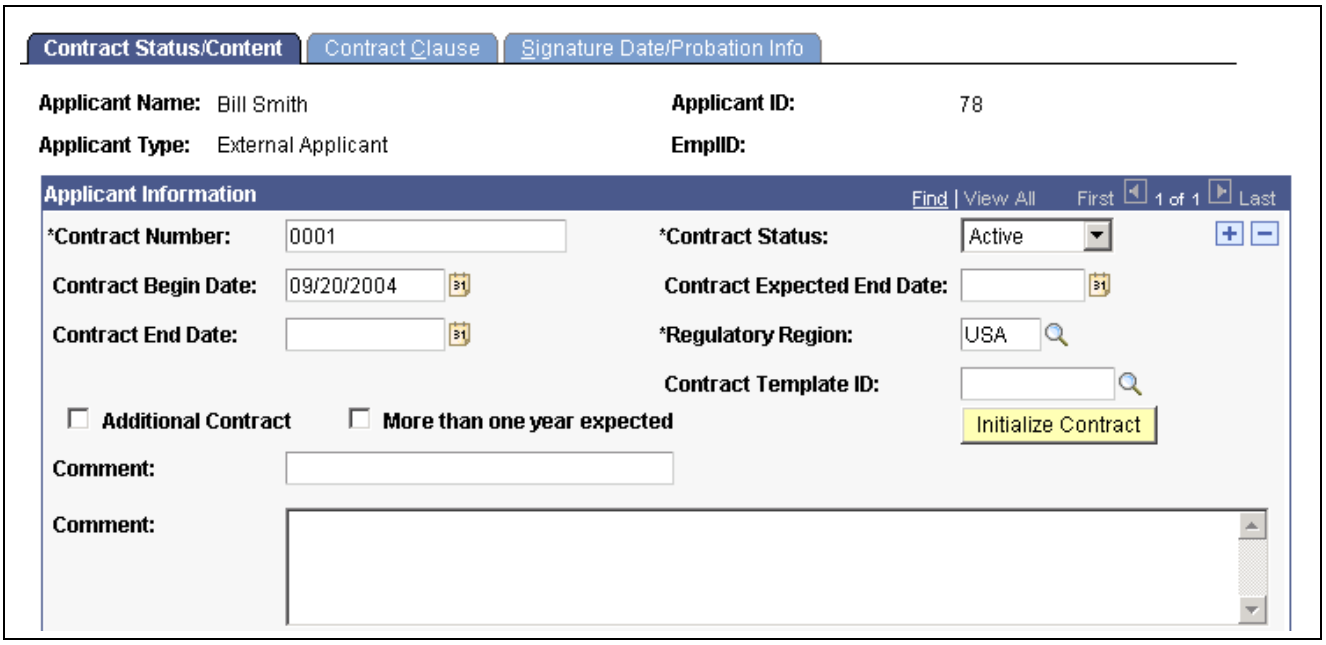
See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Entering Additional Data in Human Resources Records," Setting Up and Tracking Workforce Contracts.

Pages Used to Manage Applicant Contracts

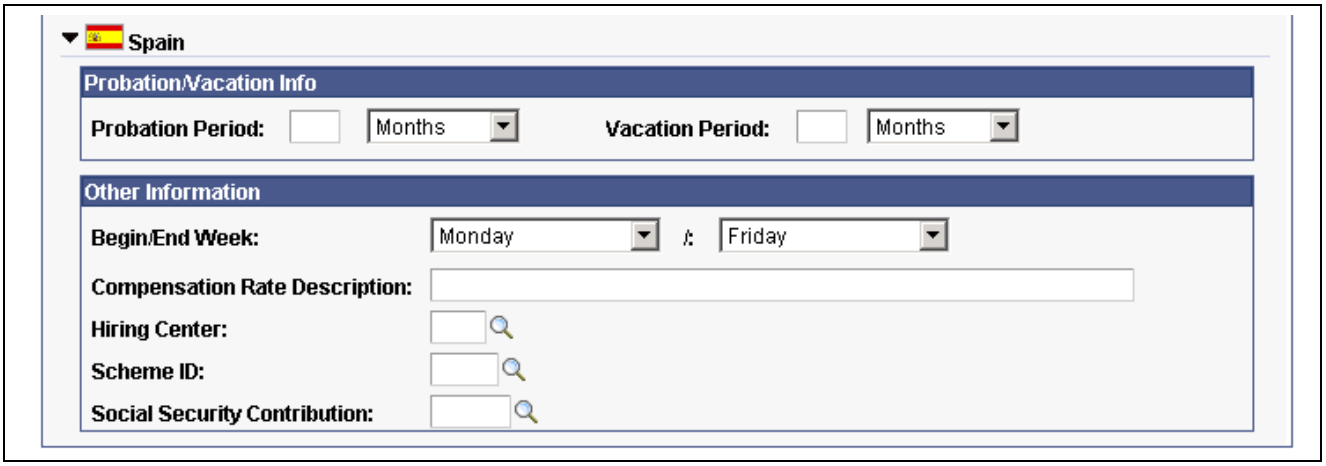
Page Name	Object Name	Navigation	Usage
Find Applicants	HRS_REC_SCHAPP	Recruiting, Find Applicant	Search and select applicants.
Manage Applicant	HRS_MANAGE_APP	Click the name link in the Search Results group box on the Find Applicants page.	Manage applicants.
Contract Status/Content	HRS_APP_CNTRCT1	Select *Manage Applicant Contract* in the Take Action field on the Manage Applicant page.	Define basic contract information.
Contract Clause	HRS_APP_CNTRCT2	Select *Manage Applicant Contract* in the Take Action field on the Manage Applicant page. Select Contract Clause page.	Define contract clause information.
Signature Date/Probation Info (signature date/probation information)	HRS_APP_CNTRCT3	Select *Manage Applicant Contract* in the Take Action field on the Manage Applicant page. Select the Signature Date/Probation Info page.	Define the signature date and probation information.

Defining Basic Contract Information

Access the Contract Status/Content page.



Contract Status/Content page (1 of 2)



Contract Status/Content page (2 of 2)

Applicant Information

Contract Number Enter the contract number. The system automatically generates a number for you that you can change.

Contract Status Indicate whether the contract is *Active* or *Inactive.*

Contract Begin Date Enter the date when the contract begins. The current date is the default.

Contract Expected End Date Enter the date when you expect the contract will end.

Contract End Date Enter the date when the contract actually ended. This may differ from the date that you expect the contract to end.

Regulatory Region Select a regulatory region.

Additional Contract Select if the worker already has at least one contract. Clear this option if this is the workers only contract.

More than one year expected Select if you expect that this contract will result in more than one year of employment for this worker.

Note. This check box is required for contracts with Japanese workers.

Comment Enter a comment. This comment is used only for informational purposes.

Comment Enter a comment. This comment is used only for informational purposes.

(ESP) Spain

Probation Period If this worker's contract includes a probation period, use these two fields to specify how long it will be. Use the first field to enter the appropriate quantity and the second field to select a unit of time. Units of time are *none, Days, Months,* or *Years.* For example, if the probation period is six months, enter *6* in the first field, then select *Months* in the second field.

Vacation Period Use these two fields to specify how much vacation the worker receives per year. Use the first field to enter the appropriate quantity and the second field to select a unit of time. Units of time are *none, Months, Natrl Days* (natural days), *Weeks,* or *Work Days.* For example, if the vacation period is 20 work days, enter *20* in the first field, then select *Work Days* from the options in the second field.

Begin/End Week Specify the days when the worker's work week begins and ends. The default values are *Monday* and *Friday.*

Compensation Rate Description Enter a free-form description of the worker's compensation rate.

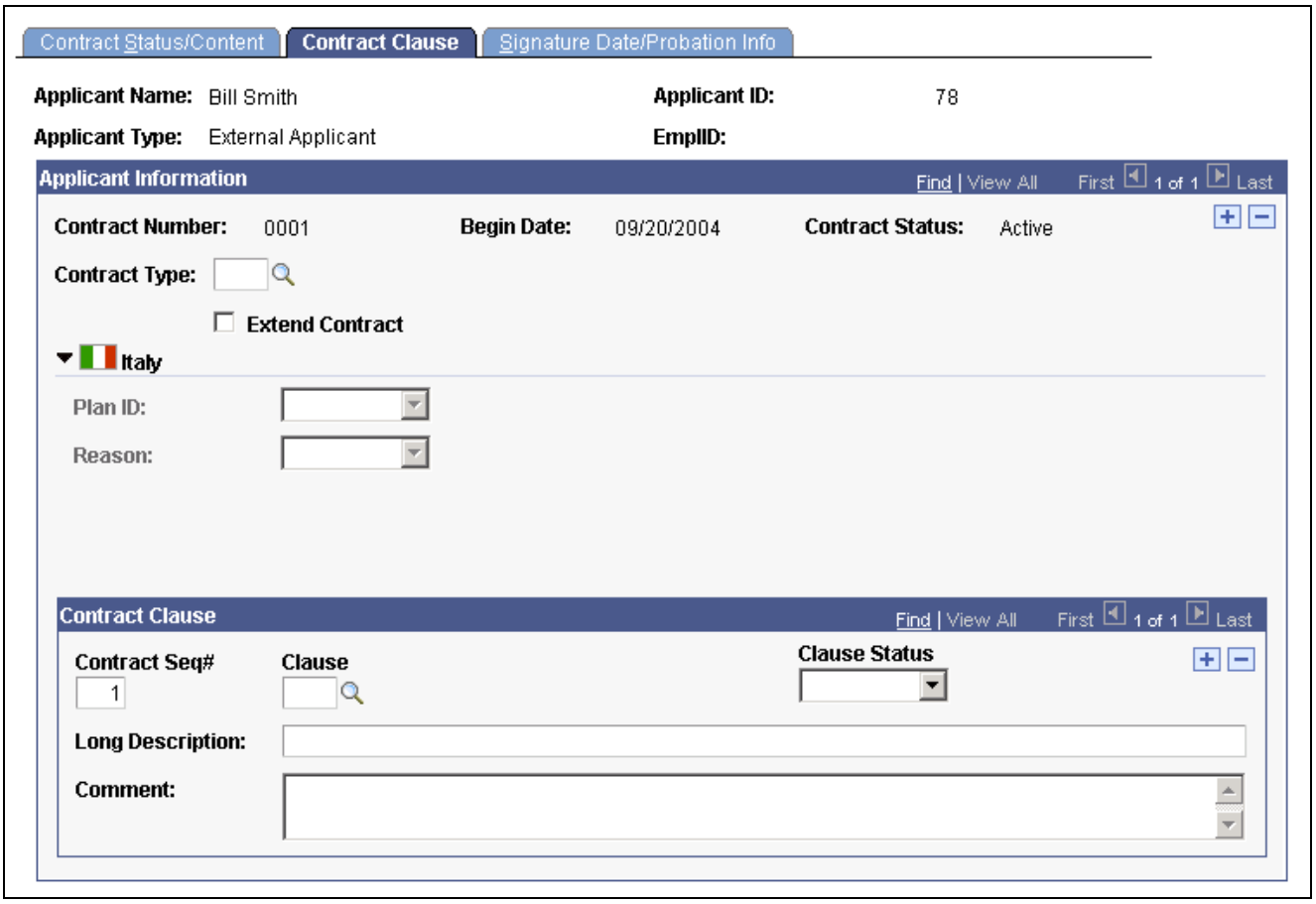
Hiring Center Select the hiring center responsible for hiring this person.

Scheme ID Select a scheme ID.

Social Security Contribution Select a social security contribution ID for the contract and scheme ID selected. The system uses both the scheme ID and the contribution ID for social security calculations, to determine the percentage or fixed amount that is applied to the calculation of a worker's contribution.

Defining Contract Clause Information

Access the Contract Clause page.



Contract Clause page

Application Information

Contract Type This is a required field that identifies the contract type for this template from the contract types that you have set up on the Contract Type Table page.

Extend Contract Select if the contract can be extended.

(ITL) Italy

Plan ID If the worker was assigned a contract type of *Training and Labor,* you must select a plan ID.

Reason If the worker was assigned a contract type of *Determined Period* contract, you must enter a reason for the contract.

Contract Clause

Contract Seq# (contract sequence number) When you add a clause to the contract, the system assigns a sequence number automatically.

Clause Select a clause.

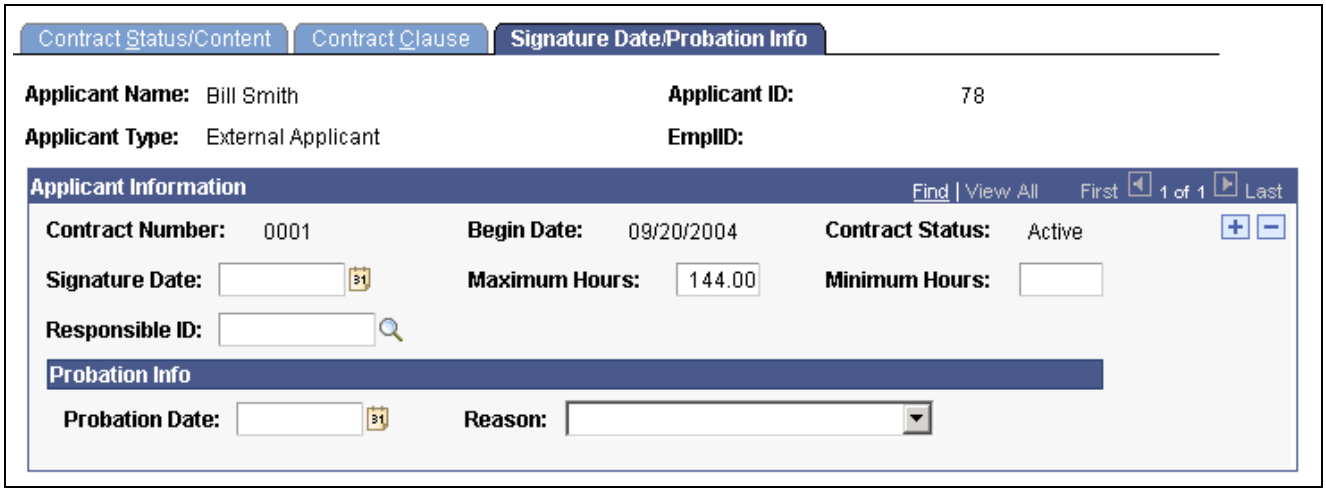
Clause Status Defaults to the status that is associated with the clause that you selected.

Long Description Enter a description. This description is used only for informational purposes.

Comment Enter a comment. This comment is used only for informational purposes.

Defining the Signature Date and Probation Information

Access the Signature Date/Probation Info page.



Signature Date/Probation Info page

Applicant Information

Signature Date Enter the contract's signature date. This information is required in some European countries, including Germany.

Maximum Hours and **Minimum Hours** Enter the maximum and minimum contract hours. These values default from the values that you indicate on the Installation table for this contract.

Responsible ID Enter the company agent who drafted the contract and who is responsible for its language.

Probation Info

Probation Date Enter multiple probation dates if they are required for this worker. The probation date that you enter here also appears on the job data record for this worker.

Reason Select a probation reason, including *New Date* and *Un-perform* (indicating additional probation time for failure to perform within expectations for the position).

(AUS) Creating Salary Packages

This section provides an overview of salary packages.

Understanding Salary Packages

Salary package modelling enables you to explore different package scenarios to find satisfactory solutions and alternatives for applicant salary packages. You can save and report on any number of package variations during the modelling process.

You can create a salary package at any point in the recruiting process. When modelling salary packages for applicants, combine any number or type of components into a package to suit both the organization and applicant.

Creating salary packages for applicants is discussed in the *PeopleSoft Human Resources Administer Salary Packaging 8.9 PeopleBook.*

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Salary Packaging*, "Modelling Salary Packages," Pages Used to Model Salary Packages for Applicants.

Hiring Applicants

This section provides an overview of hiring applicants and discusses how to prepare for hire.

- Prepare for hire.
- Review Search/Match results.

Understanding Hiring Applicants

After the applicant has accepted the job offer and their status is set to *Offer Accepted,* you can begin the hiring process.

On the Prepare for Hire page, information from the job code or position that is tied to the job opening appears. If the applicant is not linked to a job opening, you must enter a job code or position number. Also, enter the job code, start date, and type of hire.

Verifying the employee ID is required if the Required check box is selected in the Search/Match group box on the Recruiting Installation - Installation Options page. Otherwise it is optional. Verifying the employee ID enables you to check whether the applicant is already in the human resources database.

PeopleSoft delivers two search rules:

- Search Rule A (Search Order = 10) First Name, Last Name, National ID, Date of Birth are required.
- Search Rule B (Search Order = 10) First Name, Last Name are required.

When you submit the hire request, the system sets the disposition to *Ready to Hire* and sends a notification to the HR administrator. The applicant's name appears in the Manage Hire Results group box on the Manage Hires page. Applicant data is transferred to the HR database based on criteria defined on the Data Transfer to HR (HRS_MNG_HIR_STP) component.

After the applicant is hired, the system:

- Sends a message to the recruiter notifying them the applicant was hired.
- Sets the disposition to *Hired.*
- Sets the job opening status to *Closed* if the Available Openings is zero.
- Sets the job opening status is set to *Closed.*

- Updates the applicant record with the employee ID and the applicant status is set to *Hired,* if the type of hire is *Hire* or *Rehire.*
- Sets all other dispositions for other job openings for this applicant to *Reject.*
- Sets the disposition for other applicants linked to this job opening to *Reject* if the available openings is zero.
- Uses the Data Transfer to HR component to copy applicant data to the human resource database.
- Copies the contract information to the human resource database.

See Chapter 2, "Setting Up the Recruiting Process," Setting Up Talent Acquisition Manager Implementation Defaults, page 6.

See Chapter 2, "Setting Up the Recruiting Process," Setting Up the Hiring Process, page 35.

See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up and Working with Search/Match," Working with Search/Match.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Increasing the Workforce," Adding Job Applicants.

Prerequisites for Hiring Applicants

The Integration Broker must be configured in order for the applicant hire process to work. When you set the applicant's status to Ready to Hire, the system uses the HIRE_REQUEST message to pass the data to the HR_REQUEST record. Therefore, the integration broker node must be set up and active, the application server must have the pub/sub server running, and the message channel, HR_MNG_HIRES, and message, HIRE_REQUEST, must be active.

The HR administrator hires the applicant by using the Manage Hires (HR_MANAGE_HIRES) component in Administer Workforce.

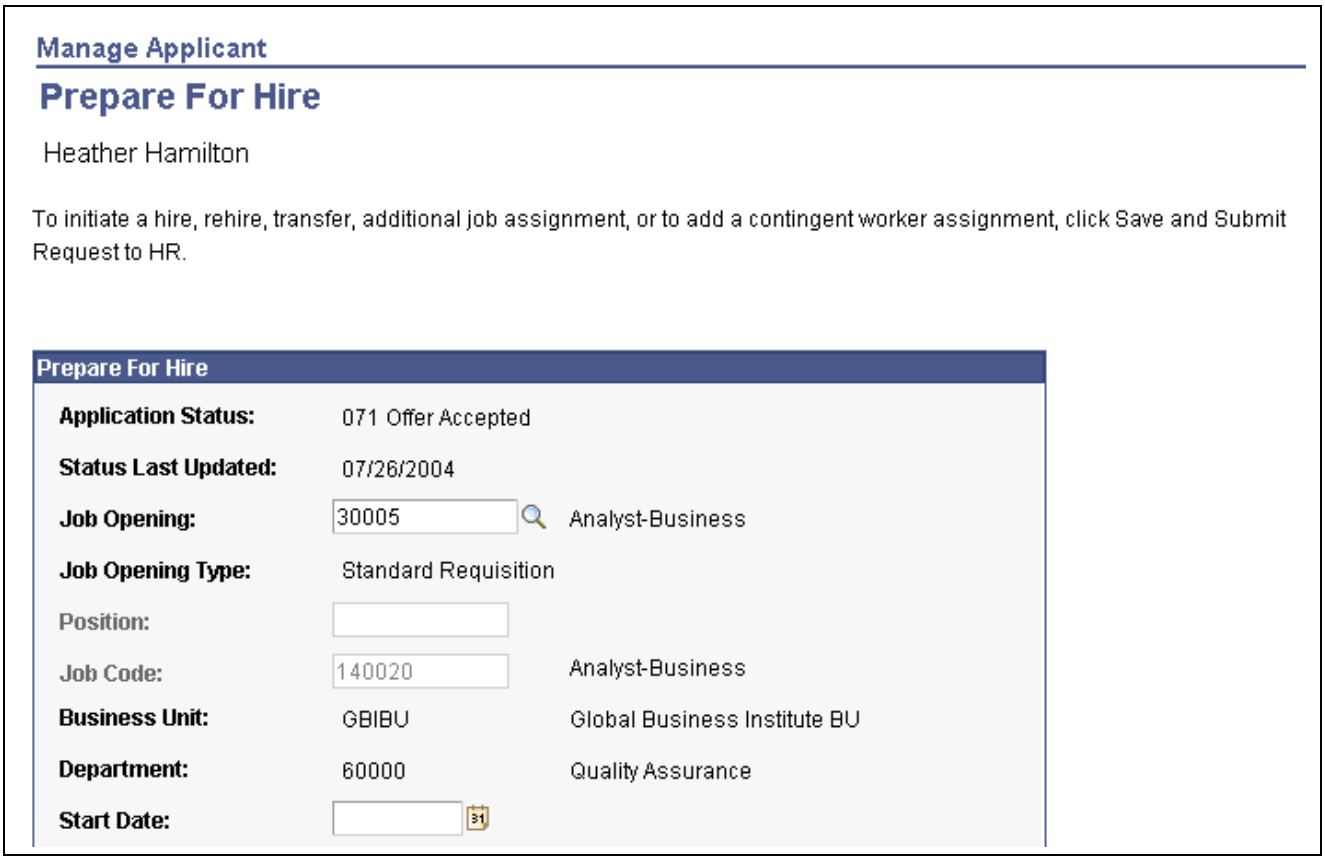
See *Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Integration Broker*

Pages Used to Hire Applicants

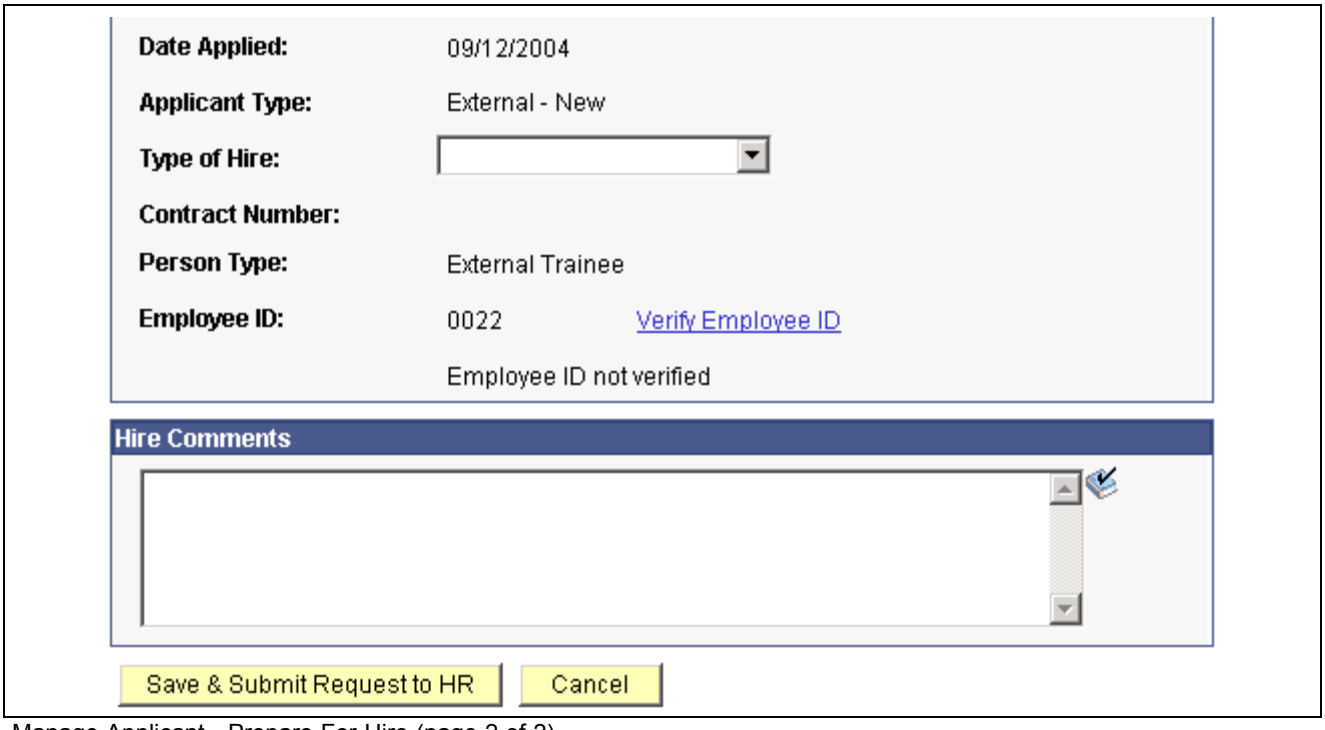
Page Name	Object Name	Navigation	Usage
Find Applicants	HRS_REC_SCHAPP	Recruiting, Find Applicants, Find Applicants	Search for applicants.
Manage Applicant - Prepare For Hire	HRS_PREP_FOR_HIRE	Click the Offer Accepted link in the Disposition column on the Find Applicants page.	Prepare for hire.
Search Results	HCR_SM_RESULTS	• Click the Verify Employee ID link on the Manage Applicant - Prepare For Hire page. • Click the Submit button on the Add Person of Interest page.	Review Search/Match results to determine whether the applicant was a former employee, contingent worker, or person of interest.

Preparing for Hire

Access the Manage Applicant - Prepare For Hire page.



Manage Applicant - Prepare For Hire page (1 of 2)



Manage Applicant - Prepare For Hire (page 2 of 2)

Prepare for Hire

Use this group box to enter the detail about the hire. The displayed information defaults to the information entered on the job opening.

Job Opening This defaults to the job opening you selected on the Find Applicants page. You can select another job opening

Job Code This defaults to the primary job code associated with the job opening selected on the Find Applicants page. You can select another job code if there are more than one job codes associated with the job opening.

If the applicant is not linked to a job code or position, you are required to enter one.

Start Date Select the date on which the applicant is to begin their employment.

Type of Hire Select the type of employment. For external applicants, you can select *Add Contingent Worker* and *Hire.* For internal applicants that are non-employees, you can select only *Hire.* For internal applicants that are employees, you can select *Add Concurrent Job, Add Contingent Worker,* or *Transfer.* External applicants and employees who indicated that they are a former worker on the job application can also select *Rehire.*

Person Type Displays the person of interest type if the applicant exists in the HR system as a person of interest. This field only appears on the page if the applicant exists in the system as a person of interest.

Verify Employee ID Click to search the human resource database to see if the applicant was a former employee, contingent worker, or person of interest.

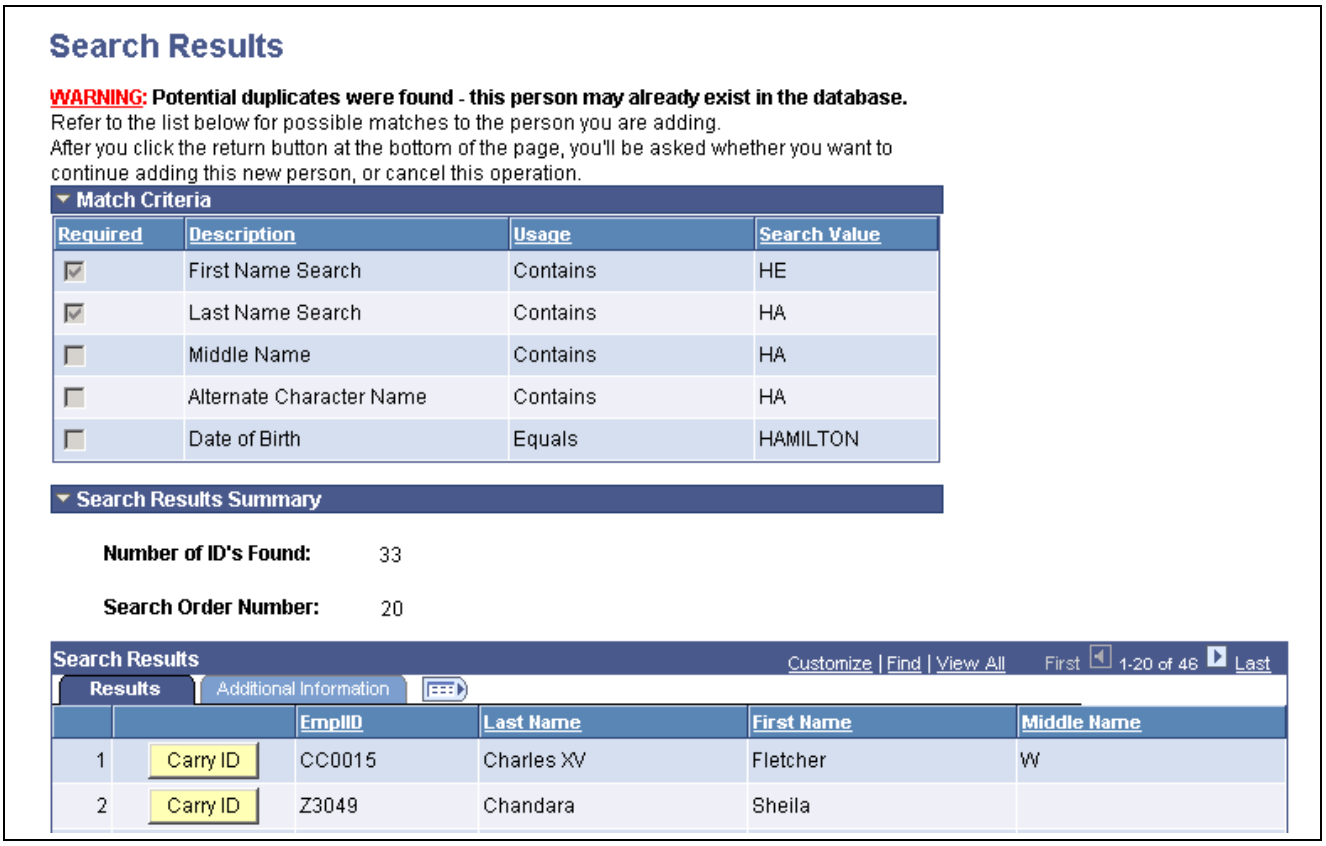
Comments Enter any comment you want the administrator to see.

Save & Submit to HR Click to send an email notification to the administrator. The applicant appears in the Manage Hires component in Administer Workforce.

The system also checks to see if *Required* is selected for the Enforce Empl ID Verification option on the Recruiting Installation - Installation Options page. If it is, you will be required to run the Verify Employee ID process.

Reviewing Search/Match Results

The Search Results page automatically displays if any potential matches to the applicant were found.



Search Results page

Results

Carry ID Click to copy the employee ID to the Employee ID field on the Prepare for Hire page.

Additional Information

Person Organizational Summary Click to access the Person Organizational Summary page.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Increasing the Workforce," Reviewing Organizational Relationships.

Relations With Institution This field is not used by Talent Acquisition Manager

(AUS) Copying Salary Packages to Human Resources

This section provides an overview of how to copy salary packages to the human resource database.

Understanding How to Copy Salary Packages to the Human Resources Database

After you have received confirmation that the applicant has been hired, you want to copy the applicants salary package information to the human resource database.

Begin by searching for applicants with a status of Hired. Click the applicants name link on the Find Applicants page and from the Manage Applicant page, select *Copy Applicant to Employee* in the Take Action field.

Copying salary package information is discussed in the *PeopleSoft Human Resources Administer Salary Packaging 8.9 PeopleBook.*

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Salary Packaging*, "Modelling Salary Packages," Copying Applicant Salary Packages to the Employee Salary Package Component.

CHAPTER 15

Managing Job Openings

This chapter discusses how to manage job openings.

Managing Job Openings

This section provides an overview of job opening pages, lists common elements, and discusses how to:

- Browse job openings.
- Review applicants linked to job openings.
- Review job opening activity.
- Add notes to job openings.
- Add attachments to job openings.
- Add expenses to job openings.
- Review job opening details.

Understanding Job Opening Pages

The Job Opening pages provide a single point from which you can complete many recruiting tasks. Four pages make up the Job Opening (HRS_JO_360) component:

- Job Opening - Manage Applicants.

  Use this page to view a list of the applicants linked to the job opening.

- Job Opening - Find Applicants.

  Use this page to search and select applicants.

- Job Opening - Activity & Attachments.

  Use this page to review and update job opening activity, notes, attachment, and expenses.

- Job Opening - Job Opening Details.

  Use this page to view job opening details.

You access the Job Opening pages through the Find Job Opening page. All of the Job Openings pages display basic information about the job opening. You can use the icons at the top of the page to perform other tasks such as; creating new job openings, saving information, cloning job openings, screening applicants, and managing interviews

See Chapter 8, “Creating Job Openings,” Creating Job Openings, page 144.

See Chapter 11, “Screening and Routing Applicants,” page 247.

See Chapter 12, “Interviewing Applicants,” page 275.

Common Elements Used in This Section



Displays the Enter Primary Job Information page.



Saves entered data.



Displays the Job Opening - Clone Job Opening page.



Displays the Job Opening - Screen Applicants page.

Previous Job Opening Displays the previous job opening in the Find Job or Browse Jobs list.

Next Job Opening Displays the next job opening in the Find Job or Browse Jobs list.

Back to List Displays either the Find Job or Browse Jobs page.

Pages Used to Manage Job Openings

Page Name	Object Name	Navigation	Usage
Browse Job Openings	HRS_JO_360_LAUNCH	Recruiting, Browse Job Openings, Browse Job Openings	Display and take action on job openings.
Find Job Opening	HRS_JO_FIND_JOB	Recruiting, Find Job Opening	Search and select job openings.
Job Opening - Manage Applicants	HRS_JO_360	Click the job opening link in Search Result group box on the Find Job Opening page.	Review job opening information.
Job Opening - Find Applicants	HRS_REC_SCHAPP	Click the Find Applicants link.	Search and select applicants.
Job Opening - Activity & Attachments	HRS_JO_360	Review job status history, notes, attachments, and expenses.	Review job opening information.
Add Note	HRS_JO_NOTE_SEC	Click Add Note from the Job Opening - Activity & Attachments page.	Add a note.
Browse	Object name not available.	Click Add Attachment from the Job Opening - Activity & Attachments page.	Add an attachment.
Add Expenses	HRS_JO_EXPENSE_SEC	Click Add Expense from the Job Opening - Activity & Attachments page.	Add a job expense.
Job Opening - Job Opening Details	HRS_JO_360	Click the job opening link in Search Result group box on the Find Job Opening page.	Review or edit job opening details.

Browsing Job Openings

Access the Browse Job Openings page.



Browse Job Openings page

View Drafts Displays only your draft job openings.

Find Job Openings Displays the Find Job page.

Job Openings

Define how you want the list of job openings to display by selecting three different options. Click the refresh icon when you change the display settings.

Job Opening Click the link to display the Job Opening page.

Select Action Select an action from the list. Valid option is *Add Note*.

Create New Job Displays the Enter Primary Job Opening Information page.

Find Job Postings Displays the Basic Search page.

Reviewing Applicants Linked to Job Openings

Access the Job Opening - Manage Applicants page.



Job Opening - Manage Applicants page

Applicants

You can view the list of applicants according the various applicant dispositions.

Job Openings

This group box displays the applicants linked to the job opening according to the disposition you selected above.

Applicant Name Click the link to display the Manage Applicant page.

Status Click the link to display the Disposition Details page.

Resume Click the link to display the Manage Applicant - Applicant Resume page.

Take Action Select one of these actions:

- *Create Interview Evaluation*

- *Forward Applicant*
- *Link Applicant to Job*
- *Manage Interviews*
- *Pre-Employment Check*
- *Prepare for Hire*
- *Prepare Job Offer*
- *Reject Applicant*
- *Route Applicant*
- *Send Correspondence*

See Chapter 17, "Managing Applicants," page 329.

See Chapter 13, "Making Job Offers," page 287.

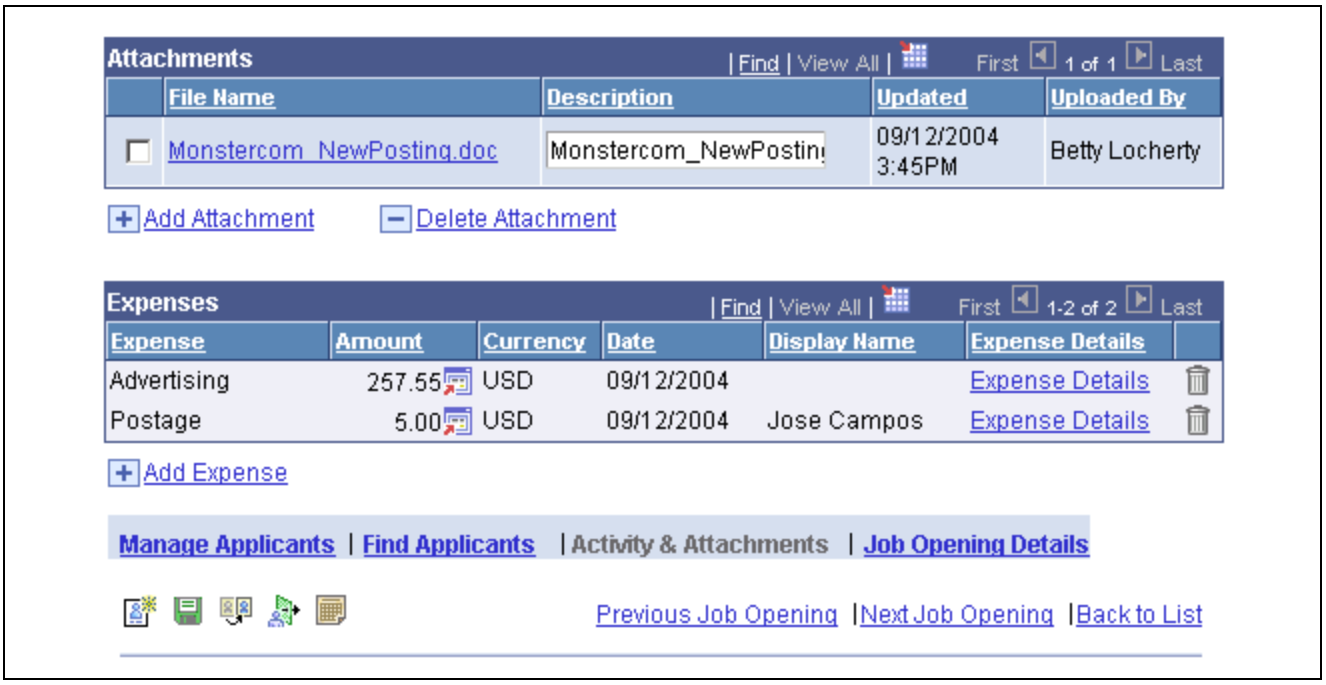
See Chapter 14, "Hiring Applicants," page 301 and Chapter 14, "Hiring Applicants," page 301.

Reviewing Job Opening Activity

Access the Job Opening - Activity & Attachments page.



Job Opening - Activity & Attachments page (1 of 2)



Job Opening - Activity & Attachments page (2 of 2)

Adding Notes to Job Openings

Access the Add Note page.

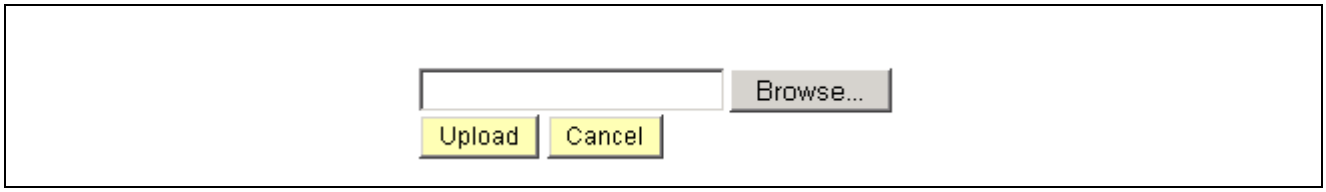


Add Note page

Audience If you want the note to be seen only by the originator, select *Private*. If you want to note to be seen by anyone, select *Public*.

Adding Attachments to Job Openings

Access the Browse page.



Browse page

Locate the file you want to attach and click Upload.

Adding Expenses to Job Opening

Access the Add Expenses page.



Add Expenses page

Job opening expenses are costs incurred for the job opening, such as costs of advertising or engaging an agency to handle the job opening. If the expense cannot be attributed to a specific applicant, use the Add Expenses page to tie the expense to the job opening.

Expense Code Select the expense code.

Expense Amount Enter the amount of the expense.

Charge Date Enter the date the expense was incurred.

Business Unit Select the business unit. The default is the business unit associated to the job opening.

Department Select the department. The default is the department associated to the job opening.

Applicant Name Enter the applicant name. For job opening expenses, this should be blank.

Description Enter a description of this expense.

Reviewing Job Opening Details

Access the Job Opening - Job Opening Details page.

The page that displays is similar to the page used when the job opening was created. page is similar to creating a new job opening and contains the same template structure. This is used to review the job opening when approvals is used. There are restrictions on who can update the job opening data:

- If the status of the job opening is *Draft*, only the creator of the job opening can update the information .
- Interviewers do not have access to Salary information.
- If status is *Hold*, *Cancelled*, or *Closed*, only Recruiting Administrators can update data.

See Chapter 8, "Creating Job Openings," Creating Job Openings, page 144.

CHAPTER 16

Managing External Job Postings

This chapter discusses how to manage external job postings.

Managing External Job Postings

This section provides an overview of external job postings and discusses how to:

- Post, update, and unpost external job postings.
- Review external job posting transaction history.
- Review the integration log.

Understanding External Job Postings

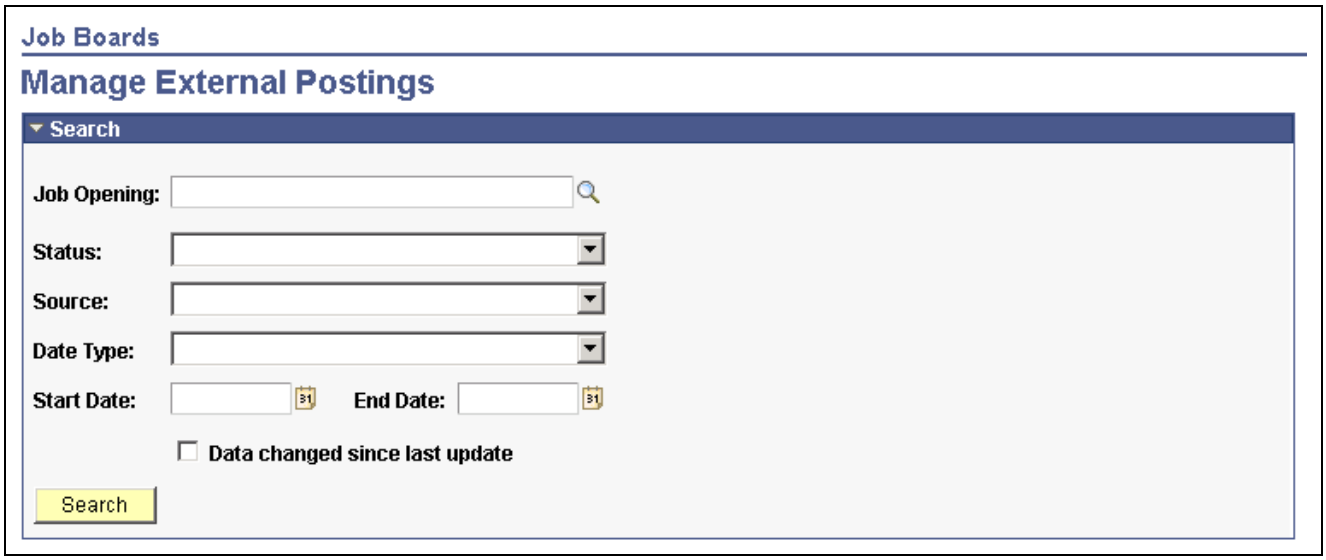
The Manage External Postings (HRS_EXTPOST) component enables you to post, update, or unpost job postings from job boards, recruitment agencies, or service procurement providers.

Pages Used to Manage External Job Postings

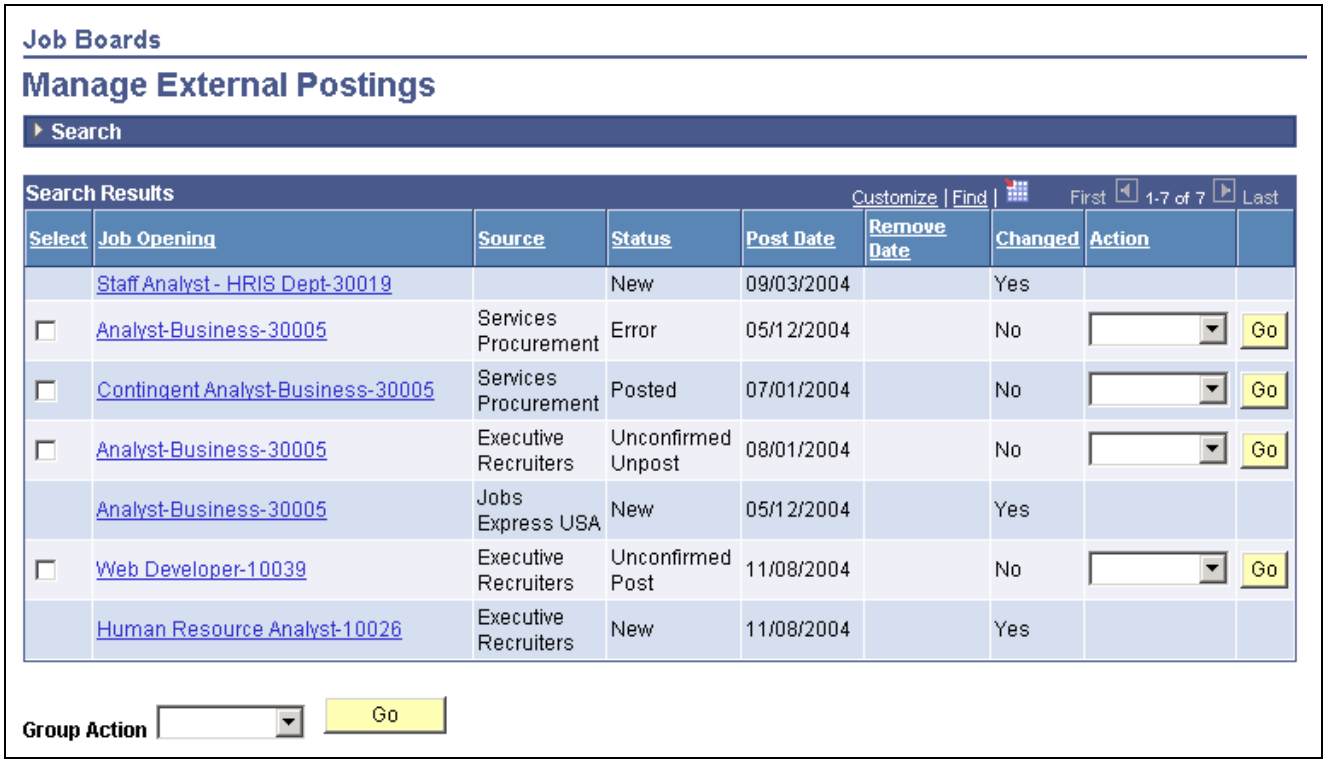
Page Name	Object Name	Navigation	Usage
Job Boards - Manage External Postings	HRS_EP_STATUS	Recruiting, Postings, Manage External Postings, Job Boards - Manage External Postings	Post, update, and unpost external job postings. Also, review history of postings.
External Posting History	HRS_EP_HISTORY	Select *History* from the Action column in the Search Results group box on the Job Boards - Manage External Postings page.	Review external job posting transactions history.
Open Integration Framework - Integration Log	HRS_HROI_LOG	Set Up HRMS, Product Specific, Recruiting, Integration, Integration Log, Open Integration Framework - Integration Log	Review the transactions.

Posting, Updating, and Unposting External Job Postings

Access the Job Boards - Manage External Postings page.



Job Boards - Manage External Postings page (1 of 2)



Job Boards - Manage External Posting page (2 of 2)

Search Results

Posting Title Click the posting title link to access the Job Opening page.

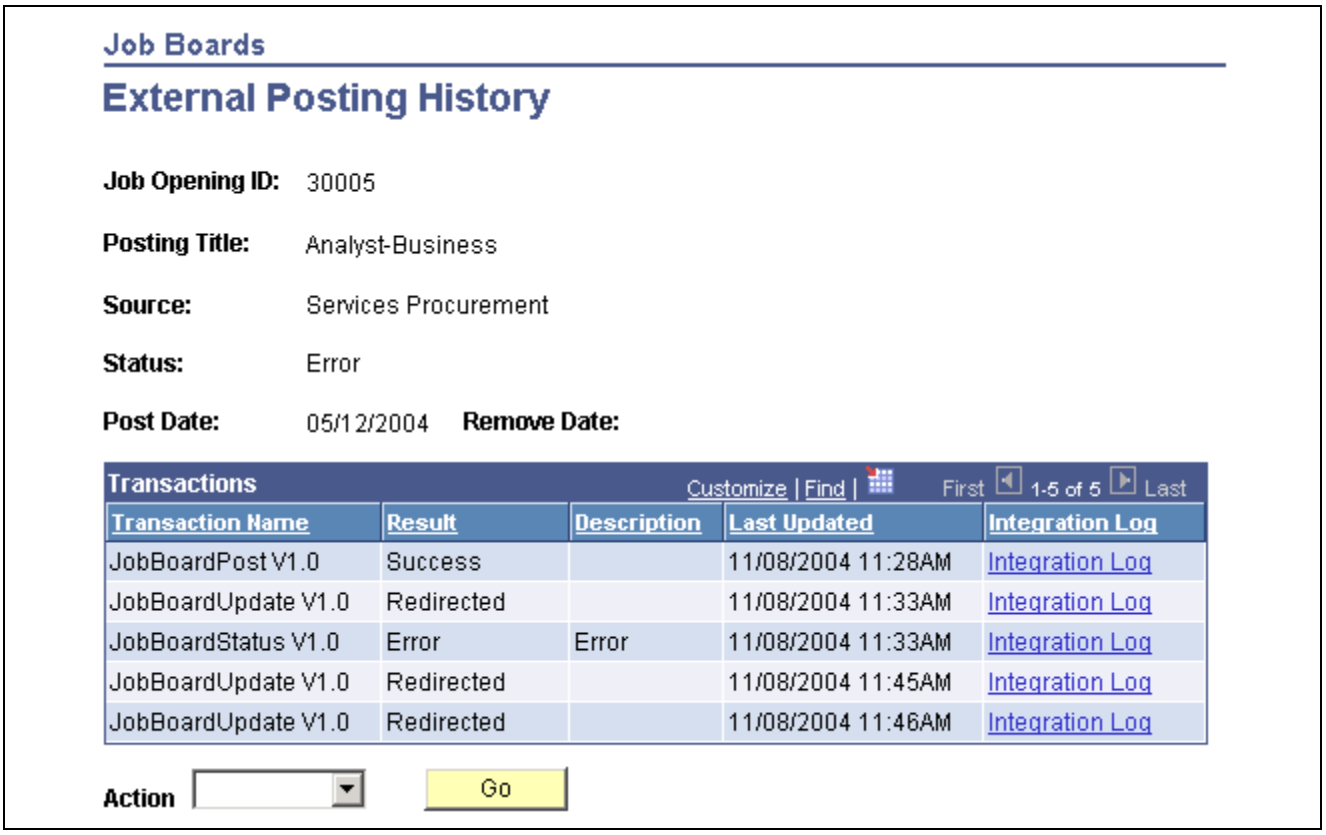
Action Select the action that you want to send to the destination source and then click Go. Options are:

- *History:* Select to access the External Posting History page, where you can review the transactions history for the external job posting.

- *Post:* Sends the post request message. The status of the corresponding job is updated to Unconfirmed Post until the destination responds.
- *Update:* As time goes by, the information associated to posted job openings may change. For example, perhaps the number of openings has increased or decreased. The job board where these jobs are posted are not automatically updated. The update action sends the update request message that will update the job board with the latest posting information. The status of the corresponding posting is not changed.
- *Unpost:* Sends the unpost request message. The status of the corresponding posting is changed to *Unconfirmed Unpost* until the job board responds.

Reviewing External Job Posting Transaction History

Access the page External Posting History page.



External Posting History page

Transactions

Transaction Name Displays the incoming or outgoing message.

Action Displays the results of the message.

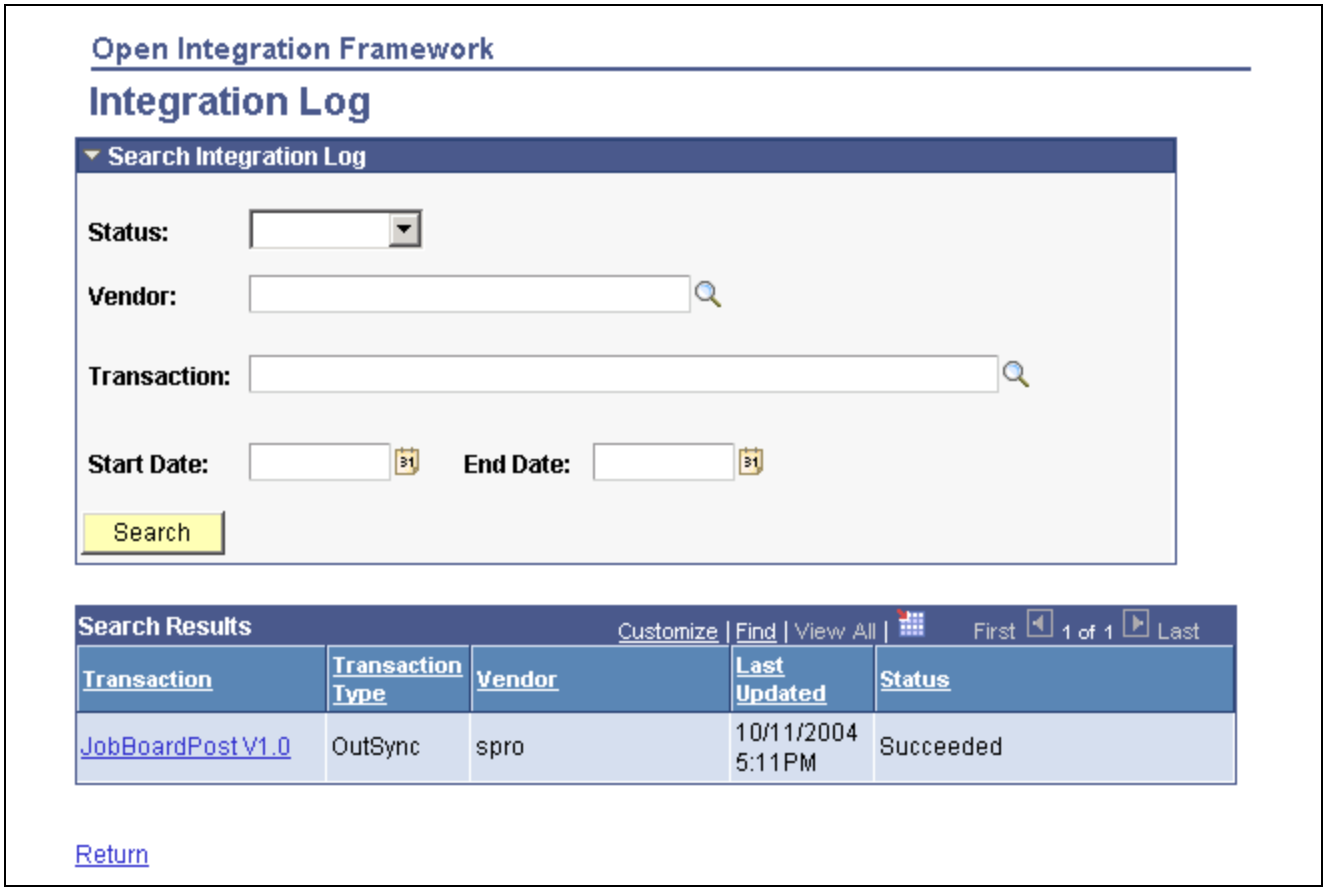
Description Displays a description of the action.

Last Updated Displays the date and time when the outgoing and incoming messages were sent and received.

Integration Log Click this link to access the Open Integration Framework - Integration Log page, where you can view detailed information about the transaction

Reviewing the Integration Log

Access the Open Integration Framework - Integration Log page.



Open Integration Framework - Integration Log page

The system displays a list of all open integration framework transactions. The link in the Transaction column enables you to view the actual XML that is generated by the transaction.

CHAPTER 17

Managing Applicants

This chapter provides an overview of how to track selectees for Japan, lists a prerequisite and common element, and discusses how to:

- Track applicant activity.
- Enter applicant expenses.
- Add contact notes and attachments.
- Edit applications and resumes.
- Edit contact information.
- Manage references.
- Edit eligibility and identity information.
- Manage applicant lists.
- Create applicant checklists.
- Forward applicants.
- Send emails and letters.
- Link applicants to job openings.
- Change applicant statuses.
- Add external trainees.
- Process duplicate applicants.
- Generate a Candidate Listing report.
- Generate an Applicant Summary by Job report.
- Generate an Applicant Summary by Source report.
- Generate a Job Group Movement Analysis report.

(JPN) Understanding How to Track Selectees for Japan

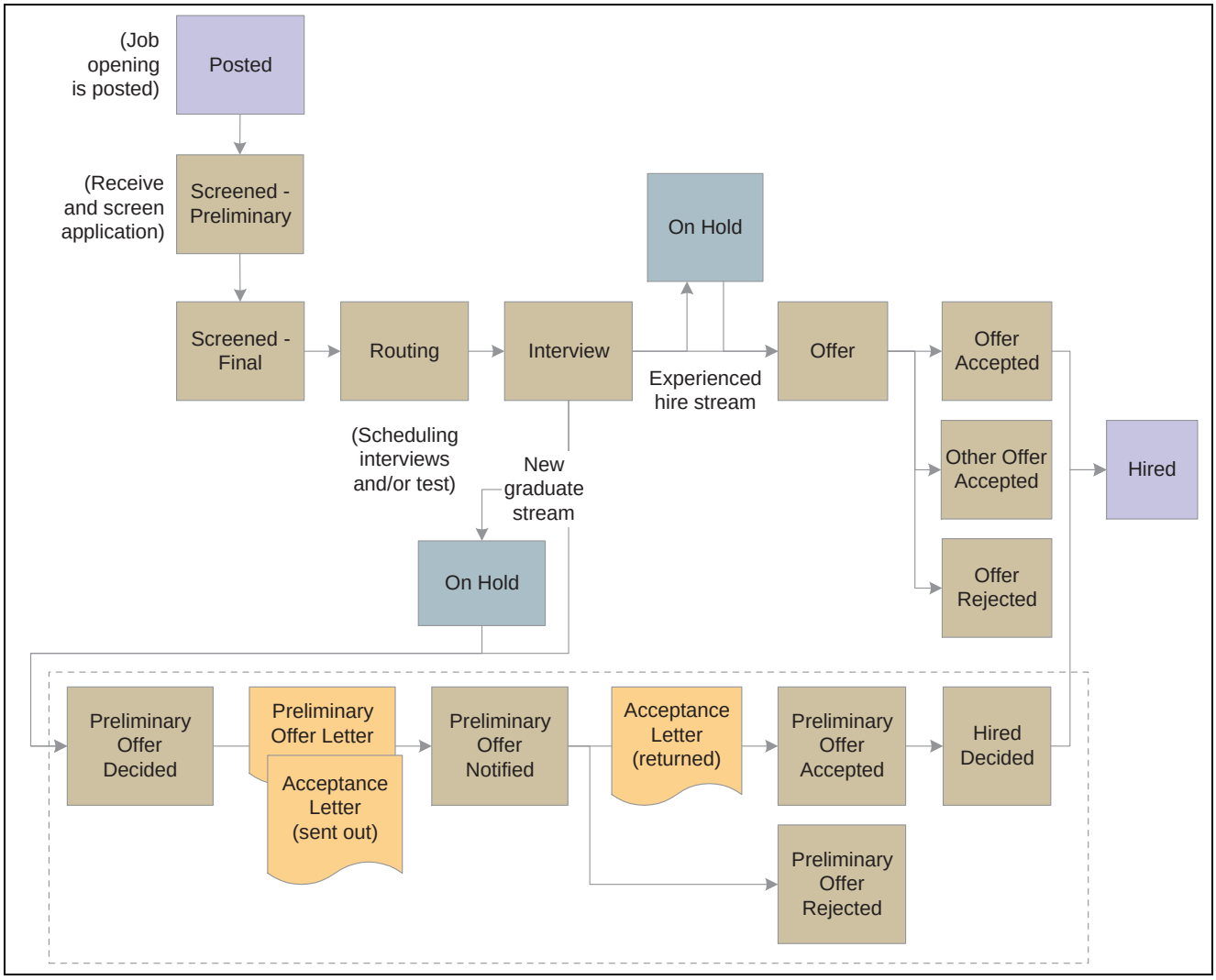
The standard PeopleSoft recruitment process begins with posting job openings and ends with hiring—when applicants become employees. In between job opening posting and hiring, there are the other recruitment activities, such as screening, interviewing, and offering and accepting employment.

The recruitment process followed by most Japanese companies, however, requires *selectee* statuses between applicant and employee. Applicants become known as selectees when they have one of these four user-maintained preliminary offer statuses (applicant and selectee statuses are also known as *dispositions*):

- Preliminary offer decided.
- Preliminary offer notified.
- Preliminary offer accepted.
- Preliminary offer rejected.

There is a fifth user-maintained status of Hire Decided. You manually enter the Hire Decided status when an applicant who has accepted a preliminary offer is about to be hired. The status of Preliminary Offer Accepted remains until that decision is made because it is possible that an applicant who has accepted might not in fact graduate and may not, therefore, be hired. The Hire Decided status distinguishes between those who have accepted and who might be hired and those who have accepted and will be hired.

This flowchart illustrates the common additional Japanese recruitment stages within the context of the standard recruitment process. The flowchart represents an organization that includes an acceptance letter with its version of a preliminary offer letter for the selectee to use when responding:



Japanese recruitment stages

Prerequisite

Before you can track applicant activity, you must enter applicants.

See Chapter 9, "Entering Applicants," page 181.

Common Element Used in this Chapter

Contact Displays the applicant's preferred contact method. Specify an applicant's preferred contact method on the Add New Applicant - Contact Details and Manage Applicant - Applicant Data: Contact pages.

Tracking Applicant Activity

This section provides an overview of applicant tracking and discusses how to:

- Track applicant activity.
- Edit disposition details.

Understanding Applicant Tracking

You can track applicant activity by using the Manage Applicant (HRS_MANAGE_APP) component. From the Manage Applicant - Applicant Activity: Current Status page, you can see where applicants are in the recruitment process for each job opening to which they are associated.

You can also view track applicant activity by using the Job Opening (HRS_JO_360) component. From the Job Opening - Manage Applicant page, you can see where all applicants are in the recruitment process for a specific job opening.

See Also

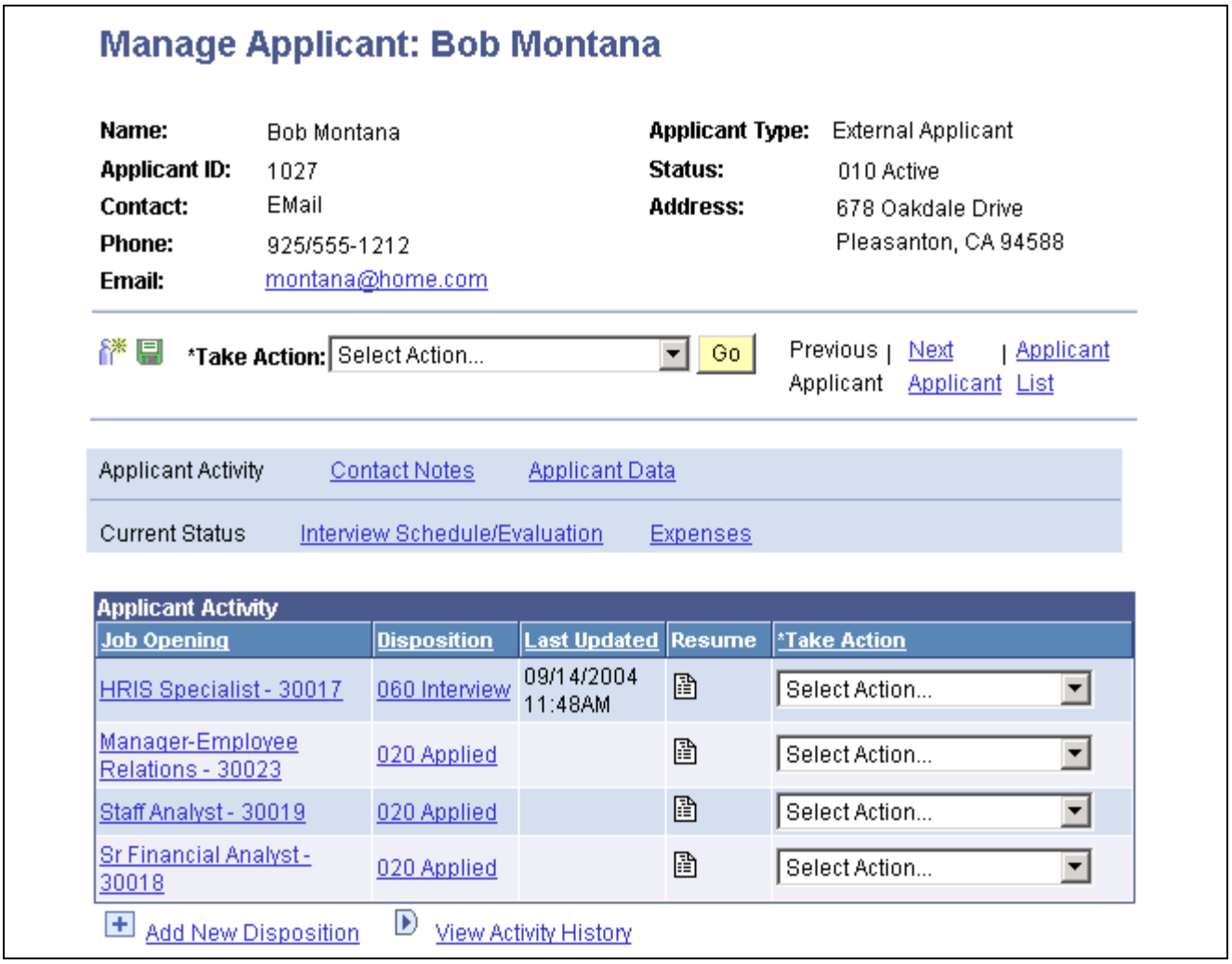
Chapter 15, "Managing Job Openings," Reviewing Applicants Linked to Job Openings, page 318

Pages Used to Track Applicant Activity

Page Name	Object Name	Navigation	Usage
Find Applicants	HRS_REC_SCHAPP	Recruiting, Find Applicants, Find Applicants	Search for and select applicants.
Manage Applicant	HRS_MANAGE_APP	Click an applicant name link in the Search Results grid on the Find Applicants page.	Manage an applicant.
Manage Applicant - Applicant Activity: Current Status	HRS_MANAGE_APP	Click the Applicant Activity link and then the Current Status link on the Manage Applicant page.	Track applicant activity.
Manage Applicant - Applicant Resume	HRS_APP_RESUME	Click the Resume icon on the Manage Applicant - Applicant Activity: Current Status page.	View an applicant's resume for a job opening.
Manage Applicant - Disposition Details	HRS_APP_RCMNT	• Click the Add New Disposition link on the Manage Applicant - Applicant Activity: Current Status page. • Click the disposition link in the Disposition column on the Manage Applicant - Applicant Activity: Current Status page.	Edit disposition details. The options on this page vary depending on the applicant's disposition.

Tracking Applicant Activity

Access the Manage Applicant - Applicant Activity: Current Status page.



Manage Applicant - Applicant Activity: Current Status page

Applicant Activity

Use this group box to view the disposition for an applicant for each job opening to which the applicant is linked. This group box also lists a disposition when an applicant is not linked with a job opening. The system sorts the information in this group box by status date, with the most recent date at the top. The default view for this group box is current activity, but you can choose to view activity history if needed.

Job Opening Click a job opening link to access the Job Opening page for that job opening.

Disposition Click the a disposition link for a job opening to access the Manage Applicant - Disposition Details page, where you can view and make changes to an applicant's disposition for that job opening.

Resume Click the Resume icon for a job opening to access the Manage Applicant - Applicant Resume page, where you can view the applicant's resume for that job opening.

Add New Disposition Click to access the Manage Applicant - Disposition Details page, where you can add a new disposition for the applicant.

View Current Activities Click to view all current activity. The system displays information for these dispositions: Draft, Review, Linked, Apply, Screen, Route, Interview,

Preliminary Offer Decided, Offer, Offer Accepted, Preliminary Offer Notified, Preliminary Offer Accepted, Preliminary Offer Rejected, Hire Decided, Ready to Hire, and Hired. If you want to view information for Hold, Reject, Withdrawn, and Inactive dispositions, you must view activity history. This link appears only when you are viewing activity history.

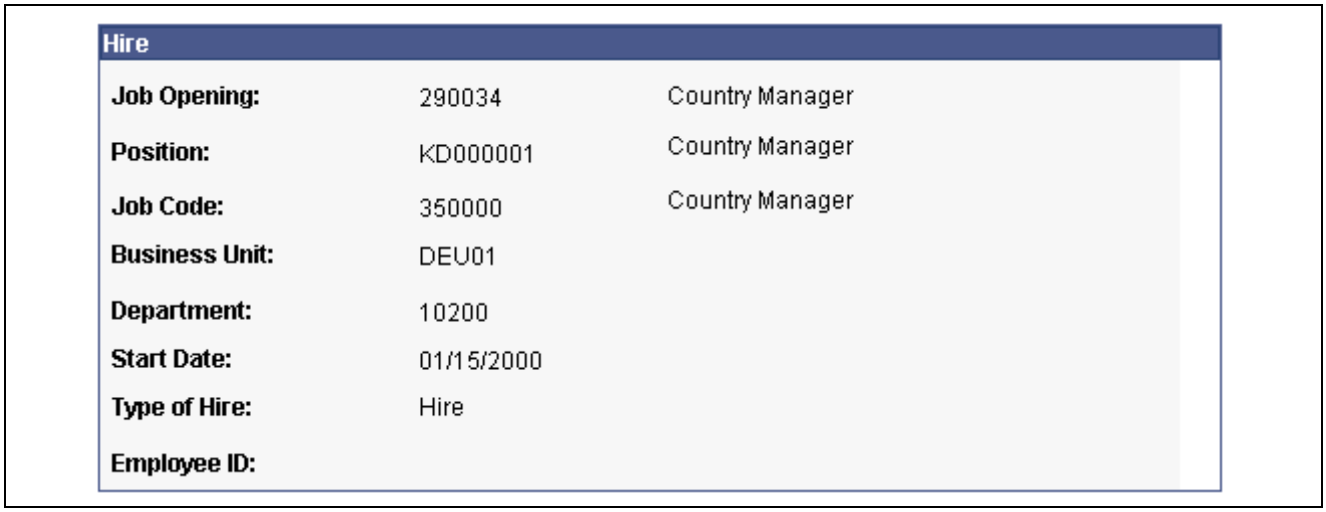
View Activity History Click to view all current and history activity. The system displays information for all dispositions. This link appears only when you are viewing current activities.

Editing Disposition Details

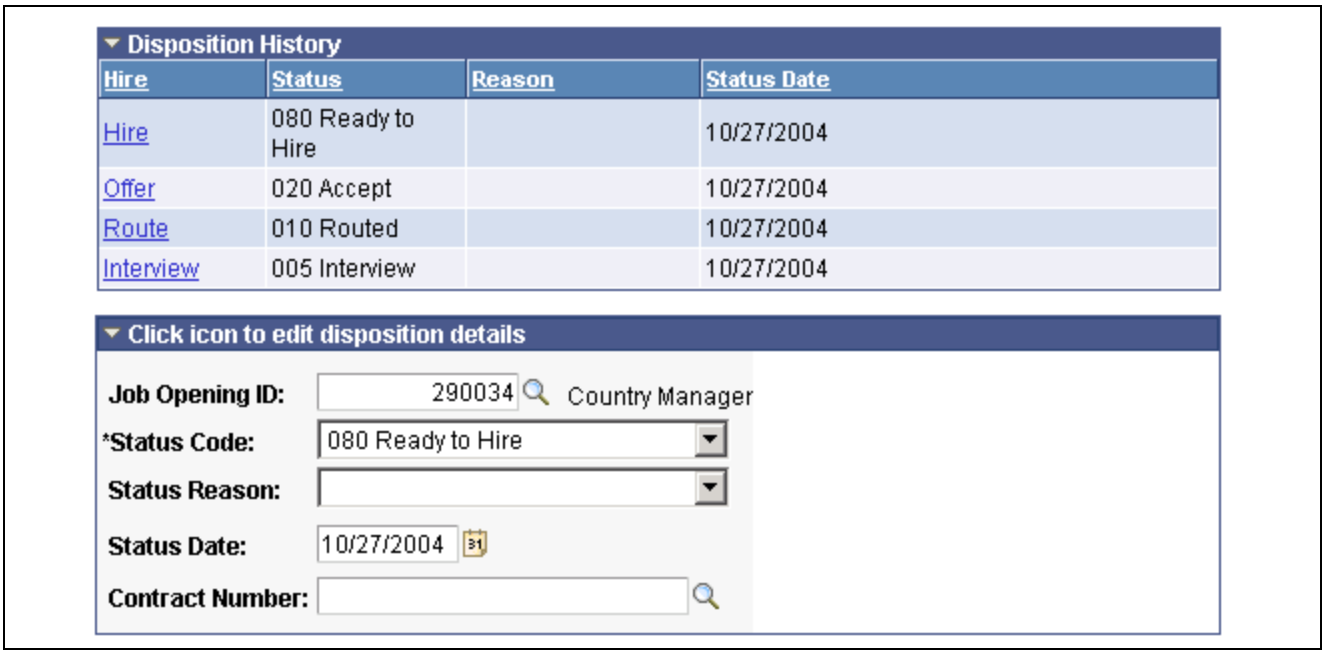
Access the Manage Applicant - Disposition Details page.



Manage Applicant - Disposition Details page (1 of 3)



Manage Applicant - Disposition Details page (2 of 3)



Manage Applicant - Disposition Details page (3 of 3)

Users can use this page view and edit details on key actions (Route, Interview, Offer, and Hire), view history for key actions, and manually override the disposition status.

Routing Details, Interviews, Offer, and Hire

The system displays either the Routing Details, Interviews, Offer, or Hire group box on the page, depending on which key action is the most recent in the disposition history. For example, if Interview is the most recent action in the disposition history, then the Interviews group box appears on this page; if Offer is the most recent action in the disposition history, then the Offer group box appears on this page. Each group box enables you to view and edit details for that disposition.

Disposition History

Use this group box to view disposition history. Only key actions (for example, Route, Interview, Offer, and Hire) appear in this grid. Each disposition appears in the grid when you perform that action for an applicant. For example, when you route an applicant, the system adds a row to this grid for the Route disposition status along with the date that the action took place. You can click a disposition link to access historical information for that disposition. For example, if you click the Interview disposition link, you can view interview schedules and evaluations for the applicant.

Click icon to edit disposition details

Use this group box to edit disposition details for an applicant. For example, when you link an applicant to a job opening, the system assigns Applied as the disposition for that job opening. You might want to change the disposition to Linked to indicate that you linked the applicant to the job opening. Or you might want to change the disposition from Applied to Review to indicate that you have reviewed a resume for the applicant. PeopleSoft recommends that you let the system assign dispositions for key actions (for example, Route, Interview, Offer, and Hire) and that you do not override dispositions for key actions.

Job Opening ID Select a job opening ID if you want to associate the applicant to a specific job to which they have not applied. If you access disposition information for a specific job opening, the job opening ID appears in this field. You can

change the job opening ID if you need to associate the applicant with a different job opening.

Contract Number Select a contract number. Only contracts that you create for the applicant appear as values in the system prompt. Create contracts for an applicant by using the HRS_APP_CNTRACT component.

Entering Applicant Expenses

This section provides an overview of applicant expenses and discusses how to:

- View applicant expenses.
- Enter applicant expenses.

See Also

Chapter 15, "Managing Job Openings," Adding Expenses to Job Opening, page 322

Understanding Applicant Expenses

You can manually enter expenses at any time in the recruitment process after you have set up job openings and linked applicants to them. You can enter expenses incurred by applicants for a given job opening in two ways:

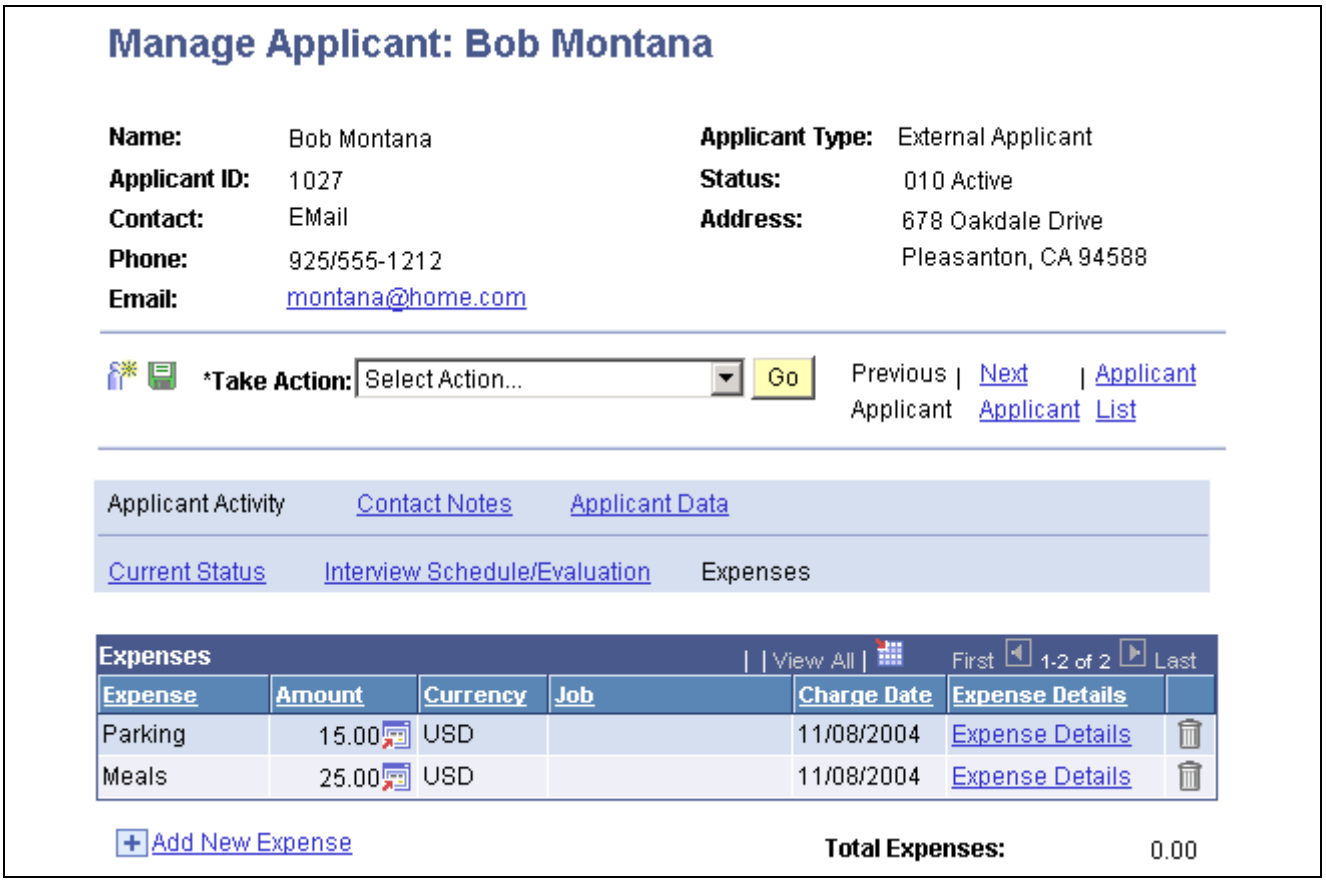
- Use the Manage Applicant - Applicant Activity: Expenses page in the Manage Applicant component.
- Use the Job Opening - Activity & Attachments page in the Job Opening component.

Pages Used to Enter Applicant Expenses

Page Name	Object Name	Navigation	Usage
Find Applicants	HRS_REC_SCHAPP	Recruiting, Find Applicants, Find Applicants	Search for and select applicants.
Manage Applicant	HRS_MANAGE_APP	Click an applicant name link in the Search Results grid on the Find Applicants page.	Manage an applicant.
Manage Applicant - Applicant Activity: Expenses	HRS_MANAGE_APP	Click the Applicant Activity link and then the Expenses link on the Manage Applicant page.	View applicant expenses.
Add Expenses	HRS_APP_EXP_SP	• Click the Add New Expense link on the Manage Applicant - Applicant Activity: Expenses page. • Click the Expense Details link on the Manage Applicant - Applicant Activity: Expenses page.	Enter applicant expenses.

Viewing Applicant Expenses

Access the Manage Applicant - Applicant Activity: Expenses page.



Manage Applicant - Applicant Activity: Expenses page

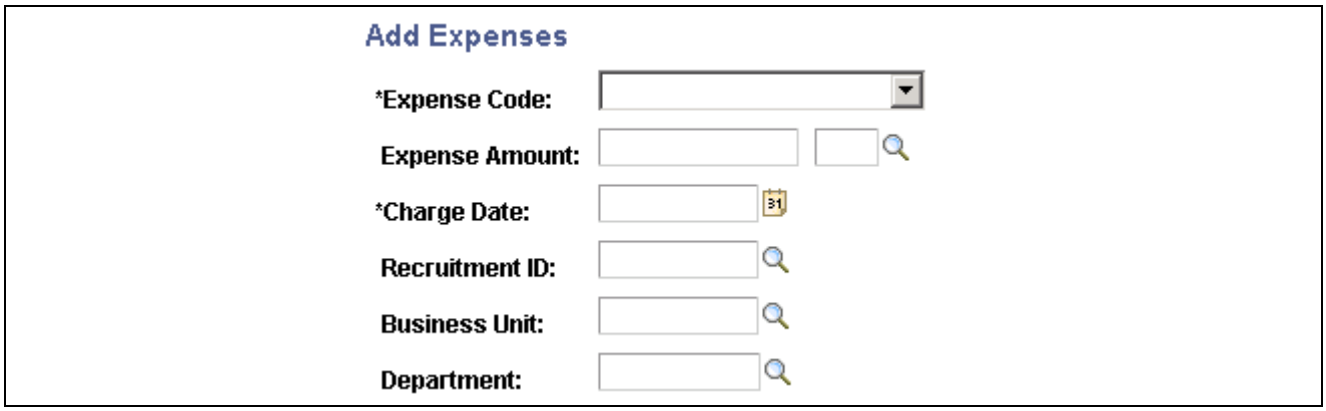
Expenses

Expense Details Click to access the Add Expenses page, where you can edit expense details for the expense.

Add New Expense Click to access the Add Expenses page, where you can add expense details for a new expense.

Entering Applicant Expenses

Access the Add Expenses page.



Add Expenses page

Expense Code	Select an expense code, such as airfare, car rental, travel, or parking.
Expense Amount	Enter an expense amount and select a currency code.
Charge Date	Enter the date that the expense occurred.
Business Unit	Select a business unit to which the expenses should be charged.
Department	Select a department to which the expenses should be charged.

Adding Contact Notes and Attachments

This section provides an overview of contact notes and attachments, lists a prerequisite, and discusses how to:

- View contact history for an applicant.
- Add contact notes and attachments.
- View proxy details.

Understanding Contact Notes and Attachments

Use the Manage Applicant - Contact Notes page to:

- Review existing contacts notes.
- Access the Add Note page, where you can add new contacts notes about interactions with an applicant.

  Interactions can be inbound or outbound phone calls, emails, faxes, and so on, depending on the contact methods that you set up on the Contact Methods page.

  On the Add note page, you can also add attachments.

You can make contact notes public or private. Only the recruiter or hiring manager that creates a private note can view that contact note. All recruiters and hiring managers can view public notes.

Prerequisite

Before you can log details for applicant interactions, you must define contact method types on the Contact Methods page.

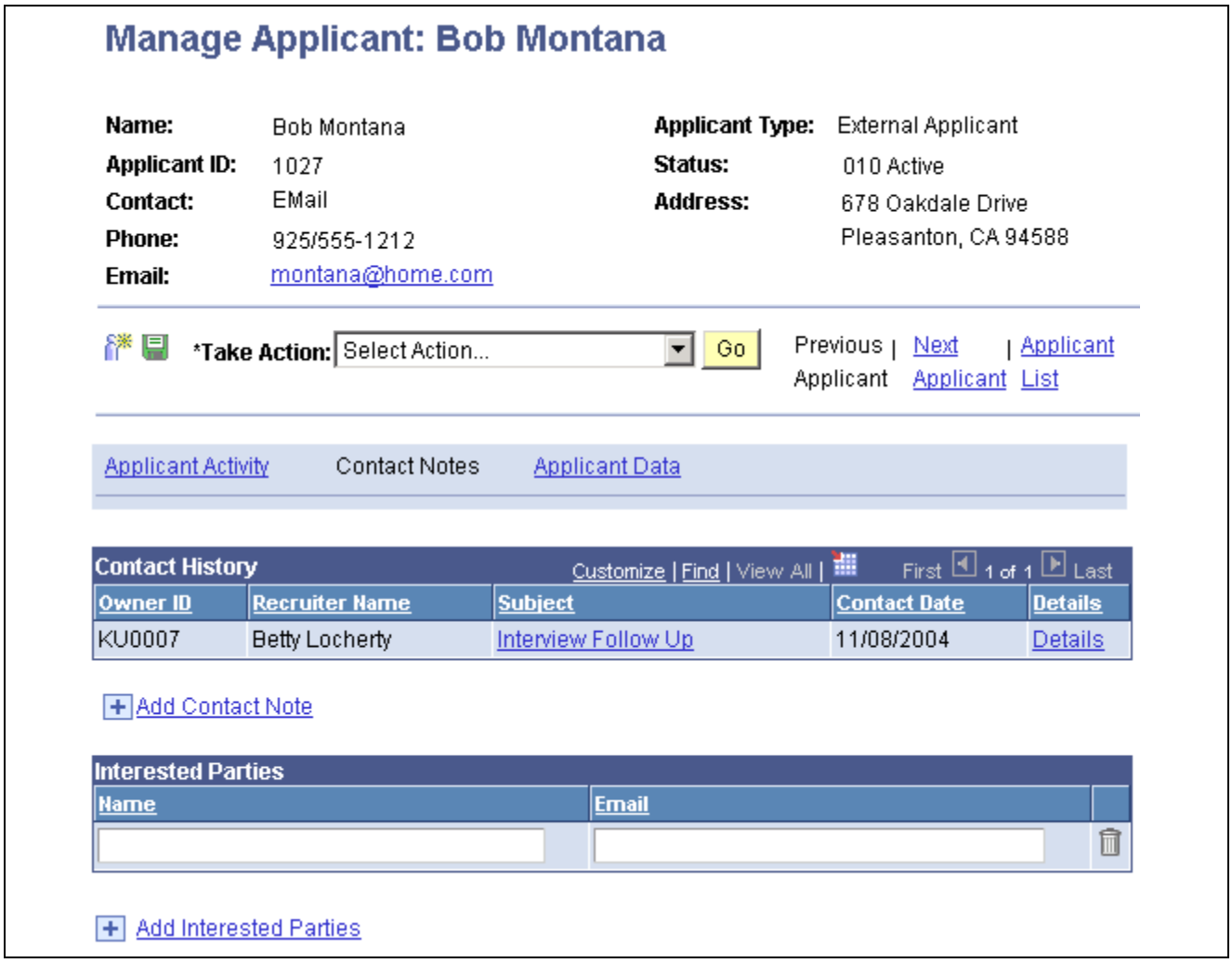
See Chapter 2, “Setting Up the Recruiting Process,” Defining Contact Method Types, page 18.

Page Used to Add Notes and Attachments

Page Name	Object Name	Navigation	Usage
Find Applicants	HRS_REC_SCHAPP	Recruiting, Find Applicants, Find Applicants	Search for and select applicants.
Manage Applicant	HRS_MANAGE_APP	Click an applicant name link in the Search Results grid on the Find Applicants page.	Manage an applicant.
Manage Applicant - Contact Notes	HRS_MANAGE_APP	Click the Contact Notes link on the Manage Applicant page.	View contact history for an applicant.
Add Note	HRS_APP_NOTES	• Click the Add Contact Note link on the Manage Applicant - Contact Notes page. • Click the Details link for an existing contact note on the Manage Applicant - Contact Notes page.	Add contact notes about interactions with an applicant and add attachments.
Proxy Details	HRS_APP_PROXY_SBP	Click the Proxy Details link on the Add Note page.	View contact information for the proxy, including the proxy’s name, email address, and phone number.

Viewing Contact History for an Applicant

Access the Manage Applicant - Contact Notes page.



Manage Applicant - Contact Notes page

Contact History

Use this group box to view a summary of all contact notes entered for an applicant. The system sorts the information in this group box by status date, with the most recent date at the top.

Contact Method Displays the contact method. Define contact methods on the Contact Method page.

Subject Displays the text entered in the Subject field on the Add Note page.

Details Click to access the Add Note page, where you can view and edit the contact note.

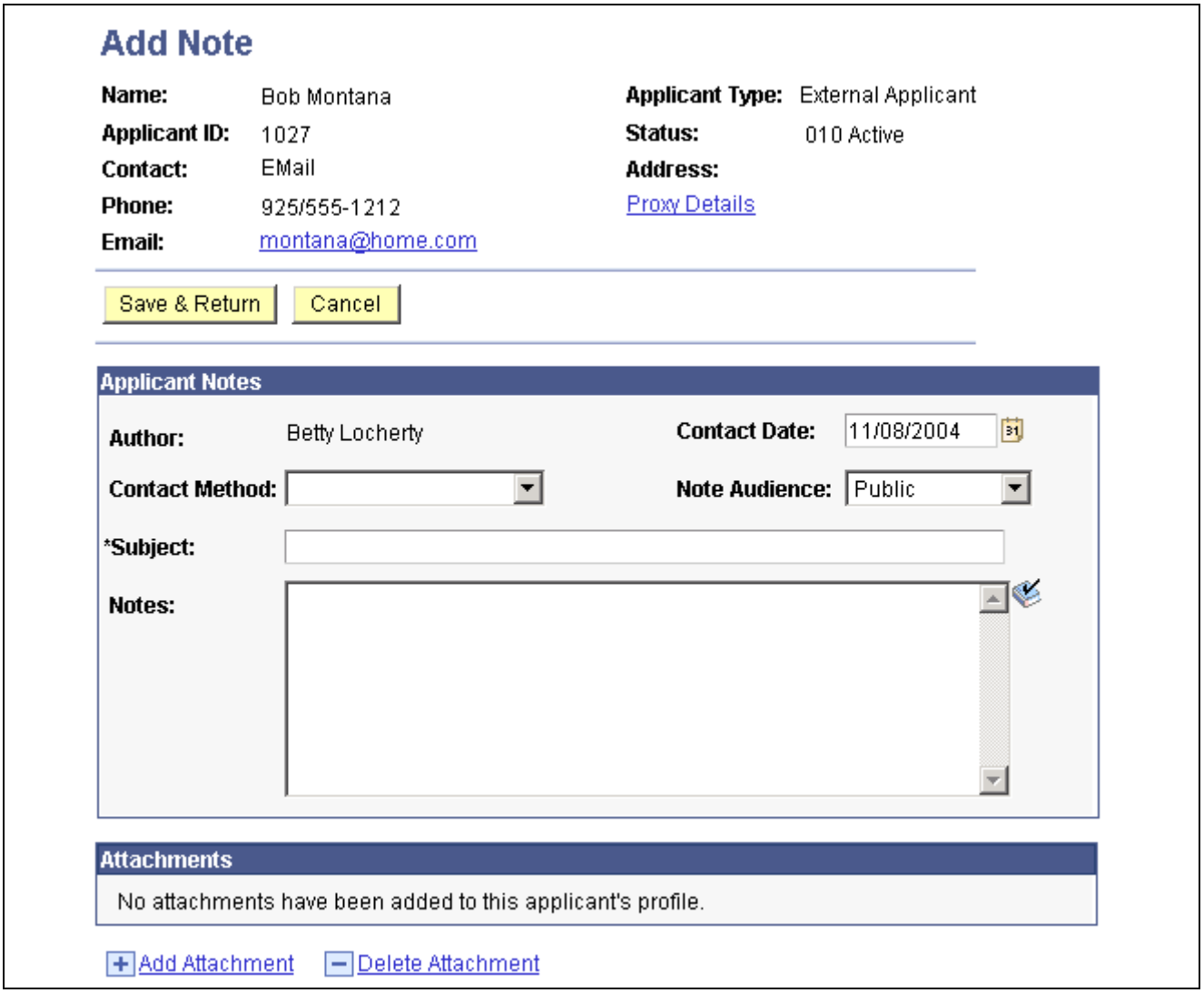
Add Contact Note Click to access the Add Note page, where you can add a new contact note.

Interested Parties

Use this group box to enter the name and email address of interested parties. When you send correspondence to an applicant, you can select the Include Interested Parties option on the Send Correspondence page to send email correspondence to the persons that you add here.

Adding Contact Notes and Attachments

Access the Add Note page.



Add Note page

Proxy Details Click to access the Proxy Details page, where you can view contact information for the proxy.

Email Click the applicant's name link to send an email to the applicant.

Applicant Notes

Contact Method Select a contact method. Define contact methods on the Contact Method page.

Note Audience Select *Public* or *Private*. You can make contact notes public or private. Only the recruiter or hiring manager that creates a private note can view that contact note. All recruiters and hiring managers can view public notes.

Subject Enter a subject. The subject that you enter appears in the Contact History group box on the Manage Applicant - Contact Notes page.

Notes Enter notes about the interactions with the applicant.

Attachments

Use this group box to add and delete attachments that pertain to the interactions that you had with the applicant.

Viewing Proxy Details

Access the Proxy Details page.



Proxy Details page

Editing Applications and Resumes

This section discusses how to:

- View applications.
- Edit applications.

Pages Used to View and Edit Applications and Resumes

Page Name	Object Name	Navigation	Usage
Find Applicants	HRS_REC_SCHAPP	Recruiting, Find Applicants, Find Applicants	Search for and select applicants.
Manage Applicant	HRS_MANAGE_APP	Click an applicant name link in the Search Results grid on the Find Applicants page.	Manage an applicant.
Manage Applicant - Applicant Data: Applications & Resumes	HRS_MANAGE_APP	Click the Applicant Data link and then the Applications & Resumes link on the Manage Applicant page.	View an applicant's applications and add new applications.

Page Name	Object Name	Navigation	Usage
Manage Applicant - Application Details	HRS_APP_PROFILE	• Click the Add Application link on the Add New Applicant - Applications page. • Click the Edit Application link on the Add New Applicant - Applications page. • Click the Add Application link on the Manage Applicant - Applicant Data: Applications & Resumes page. • Click the View Application link on the Manage Applicant - Applicant Data: Applications & Resumes page.	Enter application details.
Resume Text Printable Version	HRS_RESDTL_SEC	• Click the Printable Version link on the Add New Applicant - Application Details page. • Click the Printable Version link on the Manage Applicant - Application Details page.	Print resume text.
Employment History	HRS_APP_WRK_SEC	• Click the Add Work Experience link on the Add New Applicant - Application Details page. • Click the Edit Employment History link on the Add New Applicant - Application Details page. • Click the Add Work Experience link on the Manage Applicant - Application Details page. • Click the Edit Employment History link on the Manage Applicant - Application Details page.	Enter work experience information for an applicant. See Chapter 9, "Entering Applicants," Adding Work Experience Information, page 202.

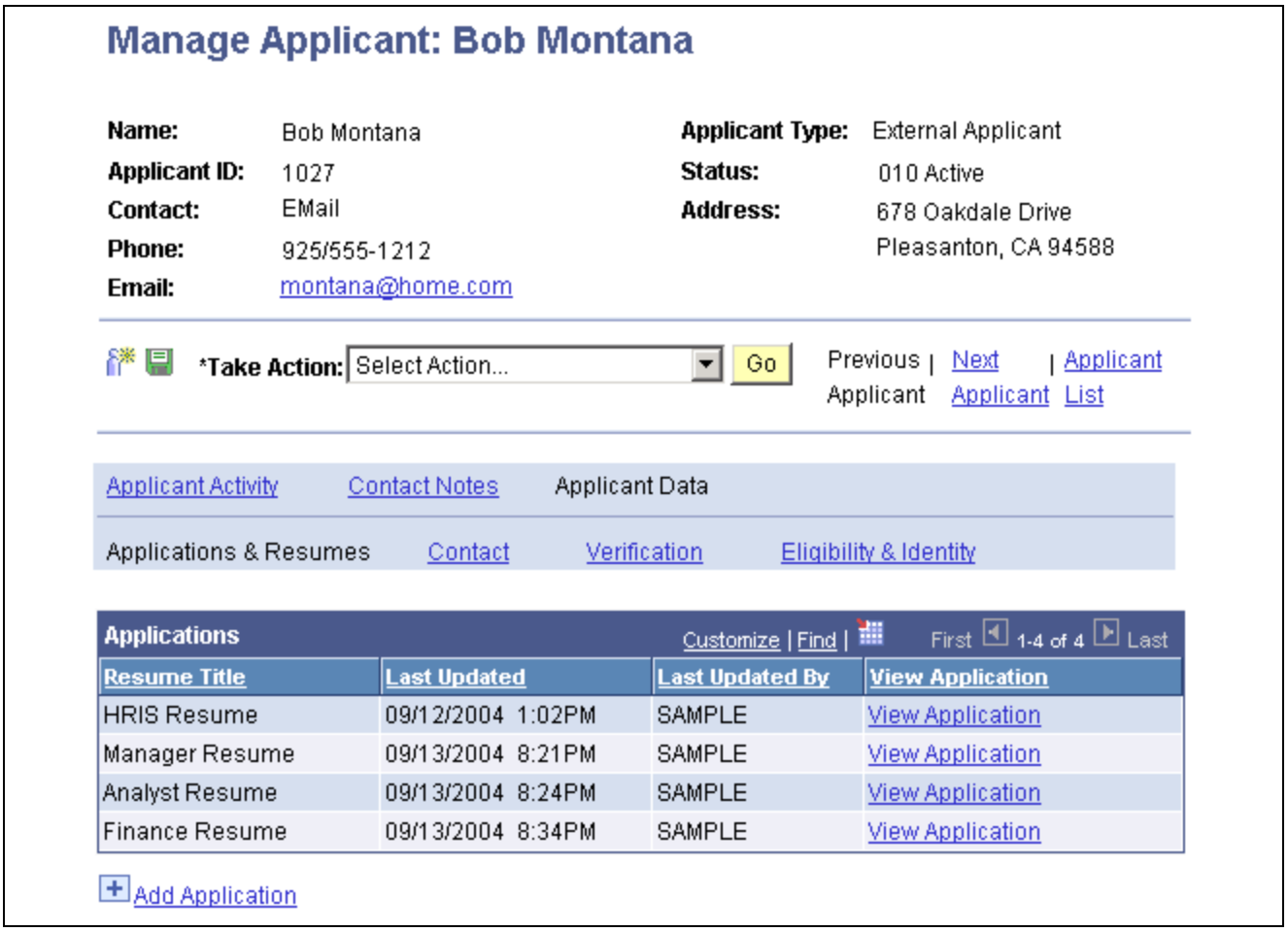
Page Name	Object Name	Navigation	Usage
Primary Education	HRS_APP_PRI_ED_SEC	• Click the Add Primary Education link on the Add New Applicant - Application Details page. • Click the Edit Primary Education link on the Add New Applicant - Application Details page. • Click the Add Primary Education link on the Manage Applicant - Application Details page. • Click the Edit Primary Education link on the Manage Applicant - Application Details page.	Enter primary education information for an applicant. See Chapter 9, "Entering Applicants," Adding Primary Education Information, page 202.
Secondary Education	HRS_APP_DEG_SEC	• Click the Add Secondary Education link on the Add New Applicant - Application Details page. • Click the Edit Secondary Education link on the Add New Applicant - Application Details page. • Click the Add Secondary Education link on the Manage Applicant - Application Details page. • Click the Edit Secondary Education link on the Manage Applicant - Application Details page.	Enter secondary education information for an applicant. See Chapter 9, "Entering Applicants," Adding Secondary Education Information, page 203.
Licenses and Certificates	HRS_APP_LIC_SEC	• Click the Add Licenses and Certificates link on the Add New Applicant - Application Details page. • Click the Edit Licenses and Certificates link on the Add New Applicant - Application Details page. • Click the Add Licenses and Certificates link on the Manage Applicant - Application Details page. • Click the Edit Licenses and Certificates link on the Manage Applicant - Application Details page.	Enter license and certificate information for an applicant.

Page Name	Object Name	Navigation	Usage
Languages	HRS_APP_LANG_SEC	• Click the Add Languages link on the Add New Applicant - Application Details page. • Click the Edit Languages link on the Add New Applicant - Application Details page. • Click the Add Languages link on the Manage Applicant - Application Details page. • Click the Edit Languages link on the Manage Applicant - Application Details page.	Enter language information for an applicant.
Memberships	HRS_APP_MBR_SEC	• Click the Add Memberships link on the Add New Applicant - Application Details page. • Click the Edit Memberships link on the Add New Applicant - Application Details page. • Click the Add Memberships link on the Manage Applicant - Application Details page. • Click the Edit Memberships link on the Manage Applicant - Application Details page.	Enter membership information for an applicant.
Honors and Awards	HRS_APP_HON_SEC	• Click the Add Honors and Awards link on the Add New Applicant - Application Details page. • Click the Edit Honors and Awards link on the Add New Applicant - Application Details page. • Click the Add Honors and Awards link on the Manage Applicant - Application Details page. • Click the Edit Honors and Awards link on the Manage Applicant - Application Details page.	Enter honors and awards information for an applicant.

Page Name	Object Name	Navigation	Usage
Evaluate Competencies - Add New Evaluation	HRS_APP_EVAL	• Click the Add Competencies link on the Add New Applicant - Application Details page. • Click the Add Competencies link on the Manage Applicant - Application Details page.	Enter competency information for an applicant. See Chapter 9, "Entering Applicants," Adding Competencies, page 204.
Evaluate Competencies - View Evaluation Detail	HRS_APP_EVAL	• Click the Edit Competencies link on the Add New Applicant - Application Details page. • Click the Edit Competencies link on the Manage Applicant - Application Details page.	Edit competency information for an applicant. See Chapter 9, "Entering Applicants," Adding Competencies, page 204.
Application Details - Add Priority Placement	HRS_CE_ADM_PP	• Click the Add Priority Placement link on the Add New Applicant - Application Details page. • Click the Edit Priority Placement link on the Add New Applicant - Application Details page. • Click the Add Priority Placement link on the Manage Applicant - Application Details page. • Click the Edit Priority Placement link on the Manage Applicant - Application Details page.	Enter priority placement information for an applicant. See Chapter 9, "Entering Applicants," (USF) Entering Priority Placement Information, page 206.

Viewing Applications

Access the Manage Applicant - Applicant Data: Applications & Resumes page.



Manage Applicant - Applicant Data: Applications & Resumes page

Applications

Use this group box to view all of an applicant's applications.

View Application Click to access the Manage Applicant - Application Details page, where you can view and edit the application.

Add Application Click to access the Manage Applicant - Application Details page, where you can add a new application for the applicant.

Editing Applications

Access the Manage Applicant - Application Details page.

The fields on this page are the same as the fields on the Add New Applicant - Contact Details page.

See Chapter 9, "Entering Applicants," Entering Application Details, page 192.

Editing Contact Information

This section discusses how to edit contact information.

Pages Used to Edit Contact Information

Page Name	Object Name	Navigation	Usage
Find Applicants	HRS_REC_SCHAPP	Recruiting, Find Applicants, Find Applicants	Search for and select applicants.
Manage Applicant	HRS_MANAGE_APP	Click an applicant name link in the Search Results grid on the Find Applicants page.	Manage an applicant.
Manage Applicant - Applicant Data: Contact	HRS_MANAGE_APP	Click the Applicant Data link and then the Contact link on the Manage Applicant page.	Edit contact information for an applicant.

Editing Contact Information

Access the Manage Applicant - Applicant Data: Contact page.

Most of the fields on this page are the same as the fields on the Add New Applicant - Contact Details page.

See Chapter 9, “Entering Applicants,” Entering Contact Information, page 183.

Applicant Type and **EmplID**

Select the type of applicant. Values are: *Employee, External Applicant,* and *Non-Employee.*

If the applicant type is *Employee* or *Non-Employee,* the EmplID field appears and displays the human resources (HR) ID number for the applicant. If the applicant type is *External Applicant,* the EmplID field appears only if you have added the external applicant to the HR system as a person of interest. Add an external applicant to the HR system as a person of interest by using the Add Person of Interest page.

See Chapter 17, “Managing Applicants,” Adding Persons of Interest, page 366.

Managing References

This section discusses how to:

- View and request references.
- Add and edit references.

Pages Used to Manage References

Page Name	Object Name	Navigation	Usage
Find Applicants	HRS_REC_SCHAPP	Recruiting, Find Applicants, Find Applicants	Search for and select applicants.
Manage Applicant	HRS_MANAGE_APP	Click an applicant name link in the Search Results grid on the Find Applicants page.	Manage an applicant.
Manage Applicant - Applicant Data: Verification	HRS_MANAGE_APP	Click the Applicant Data link and then the Verification link on the Manage Applicant page.	View, add, and request references.
Add Reference Details	HRS_APP_REF_SEC	• Click the Add Reference link on the Manage Applicant - Applicant Data: Verification page. • Click the Add Reference link on the Add New Applicant - Verification page.	Enter reference details for an applicant.
Edit Reference Details	HRS_APP_REF_SEC	• Click the Edit References link on the Manage Applicant - Applicant Data: Verification page. • Click the Edit References link on the Add New Applicant - Verification page.	Edit reference details for an applicant.

Viewing and Requesting References

Access the Manage Applicant - Applicant Data: Verification page.

The fields on this page are the same as the fields on the Add New Applicant - Verification page.

See Chapter 9, “Entering Applicants,” Requesting References, page 207.

Adding and Editing References

Access the Add Reference Details page or the Edit Reference Details page.

See Chapter 9, “Entering Applicants,” Entering References, page 207.

Editing Eligibility and Identity Information

This section discusses how to edit eligibility and identity information.

Pages Used to Edit Eligibility and Identity Information

Page Name	Object Name	Navigation	Usage
Find Applicants	HRS_REC_SCHAPP	Recruiting, Find Applicants, Find Applicants	Search for and select applicants.
Manage Applicant	HRS_MANAGE_APP	Click an applicant name link in the Search Results grid on the Find Applicants page.	Manage an applicant.
Manage Applicant - Applicant Data: Eligibility & Identity	HRS_MANAGE_APP	Click the Applicant Data link and then the Eligibility & Identity link on the Manage Applicant page.	Edit eligibility and identity information for an applicant.
National Id	HRS_APP_NID	• Click the Add National Identification link on the Add New Applicant - Eligibility & Identity page. • Click the Edit National Id link on the Add New Applicant - Eligibility & Identity page. • Click the Add National Identification link on the Manage Applicant - Applicant Data: Eligibility & Identity page. • Click the Edit National Id link on the Manage Applicant - Applicant Data: Eligibility & Identity page.	Enter national ID information for an applicant. See Chapter 9, "Entering Applicants," Entering National ID Information, page 222.
Citizenship	HRS_APP_CIT_PSP1	• Click the Add Citizenship link on the Add New Applicant - Eligibility & Identity page. • Click the Add Citizenship link on the Manage Applicant - Applicant Data: Eligibility & Identity page. • Click the Edit Citizenship Details link on the Add New Applicant - Eligibility & Identity page. • Click the Edit Citizenship Details link on the Manage Applicant - Applicant Data: Eligibility & Identity page.	Enter citizenship information for an applicant. See Chapter 9, "Entering Applicants," Entering Citizenship Information, page 223.

Page Name	Object Name	Navigation	Usage
Visa Permit Details	HRS_APP_VSA_PMT1	• Click the Add Visa Permit link on the Add New Applicant - Eligibility & Identity page. • Click the Add Visa Permit link on the Manage Applicant - Applicant Data: Eligibility & Identity page. • Click the Edit Visa Permit Details link on the Add New Applicant - Eligibility & Identity page. • Click the Edit Visa Permit Details link on the Manage Applicant - Applicant Data: Eligibility & Identity page.	Enter visa permit information for an applicant. See Chapter 9, "Entering Applicants," Entering Visa Permit Information, page 224.
Bank Account	HRS_APP_BANKACCT	• Click the Add Bank Account link on the Add New Applicant - Eligibility & Identity page. • Click the Edit Bank Account link on the Add New Applicant - Eligibility & Identity page. • Click the Add Bank Account link on the Manage Applicant - Applicant Data: Eligibility & Identity page. • Click the Edit Bank Account link on the Manage Applicant - Applicant Data: Eligibility & Identity page.	Enter bank account information for an applicant. See Chapter 9, "Entering Applicants," Entering Bank Account Information, page 224.

Editing Eligibility and Identity Information

Access the Manage Applicant - Applicant Data: Eligibility & Identity page.

The fields on this page are the same as the fields on the Add New Applicant - Eligibility & Identity page.

See Chapter 9, "Entering Applicants," Adding Eligibility and Identity Information, page 212.

Managing Applicant Lists

This section provides an overview of applicant lists and discusses how to:

- View existing applicant lists.
- Create applicant lists.
- Manage applicant lists.
- Edit primary applicant list data.
- Add applicants to applicant lists.

Understanding Applicant Lists

Applicant lists are logical groupings of applicants that recruiters can use to facilitate the recruiting process. Recruiters can add applicants to a list and then perform tasks for one, several, or all applicants on the list at the same time. For example, a recruiter can create a list of applicants that they need to contact, a list of applicants that are hot prospects but for whom there is no current applicable job opening, or a list of college students that will graduate in the fall that the recruiter might want to hire in the spring.

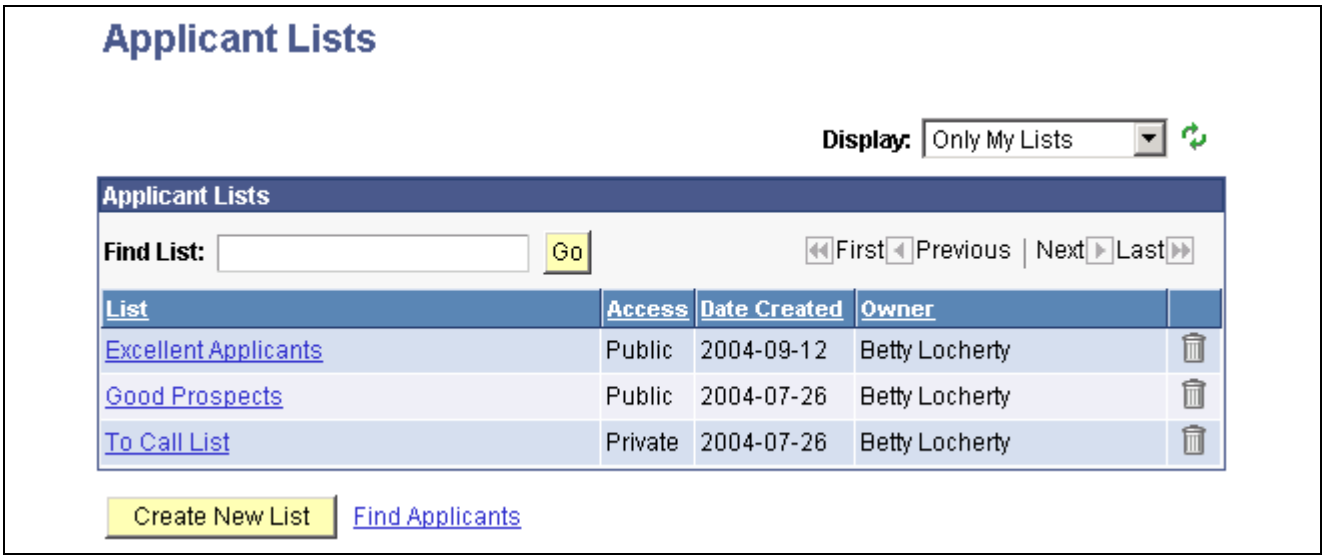
Lists can be public or private. The creator of an applicant list is the owner of the list. All recruiters and hiring managers have access to public lists. They can view public lists, take actions on the applicants in the lists, add applicants to the lists, and view primary list information, but they cannot make changes to the primary list information. Only the list owner can edit primary list information for public lists. For private lists, only the list owner can view and make changes to the lists.

Pages Used to Manage Applicant Lists

Page Name	Object Name	Navigation	Usage
Applicant Lists	HRS_APPL_LIST	Recruiting, Applicant Lists, Applicant Lists	View existing applicant lists.
Create New List	HRS_CREATE_LIST	Click the Create New List button on the Applicant Lists page.	Create an applicant list.
Applicant List	HRS_LIST_MEMBER	Click the Add Applicants button on the Applicant Lists page.	Manage an applicant list.
Edit Primary List Information	HRS_CREATE_LIST	Click the Edit Primary List Data link on the Applicant List page.	Edit primary applicant list data.
Select Applicant List	HRS_SELECT_LIST	Click the Add Applicants button on the Applicant List page to access the Find Applicants page. On the Find Applicants page, select *Add Applicant to Saved List* in the Take Action field for an applicant, or select one or more applicants and select *Add Applicant to Saved List* in the Group Action field and click Go.	Select the applicant list to which you want to add an applicant.

Viewing Existing Applicant Lists

Access the Applicant Lists page.



Applicant Lists page

Display Select which applicant lists you want to view and click the Refresh icon to view those lists. Values are:

Only My Lists: Select to view all lists to which you are the owner.

All Lists: Select to view all public lists and all lists to which you are the owner.

Applicant Lists

Find List and **Go** Enter a partial or full list name to search for that list and click Go to display the search results.

List Click a link to access the Applicant List page, where you can view details for all applicants on the list.

Access Displays whether the list is public or private.

Owner Displays the name of the user that created the list.

Creating Applicant Lists

Access the Create New List page.



Create New List page

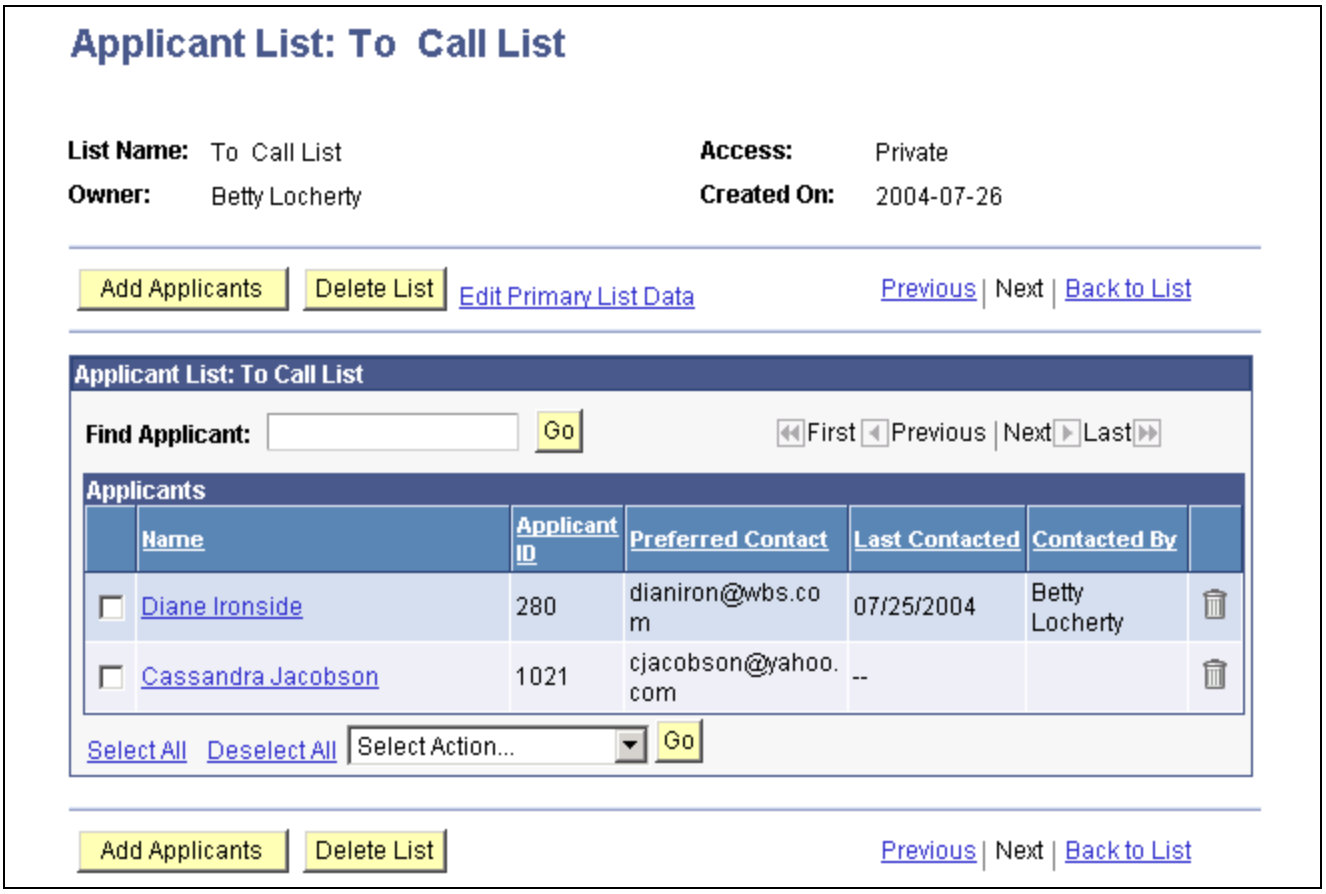
Name Your New List

Active Select *Active* or *Inactive.* When a list is inactive, only the list owner can view the list. You cannot add applicants to inactive lists.

Public Select to make the list a public list. Clear this check box if you want this list to be private.

Managing Applicant Lists

Access the Applicant List page.



Applicant List page

Find Applicant and **Go** Enter the partial or full name of the applicant that you are searching for and click Go to display the search results.

Add Applicants Click to access the Find Applicants page, where you can search for and select applicants to add to the list.

Delete List Click to delete the list. Only the list owner can delete the list.

Edit Primary List Data Click to access the Edit Primary List Information page, where you can make changes to the applicant list.

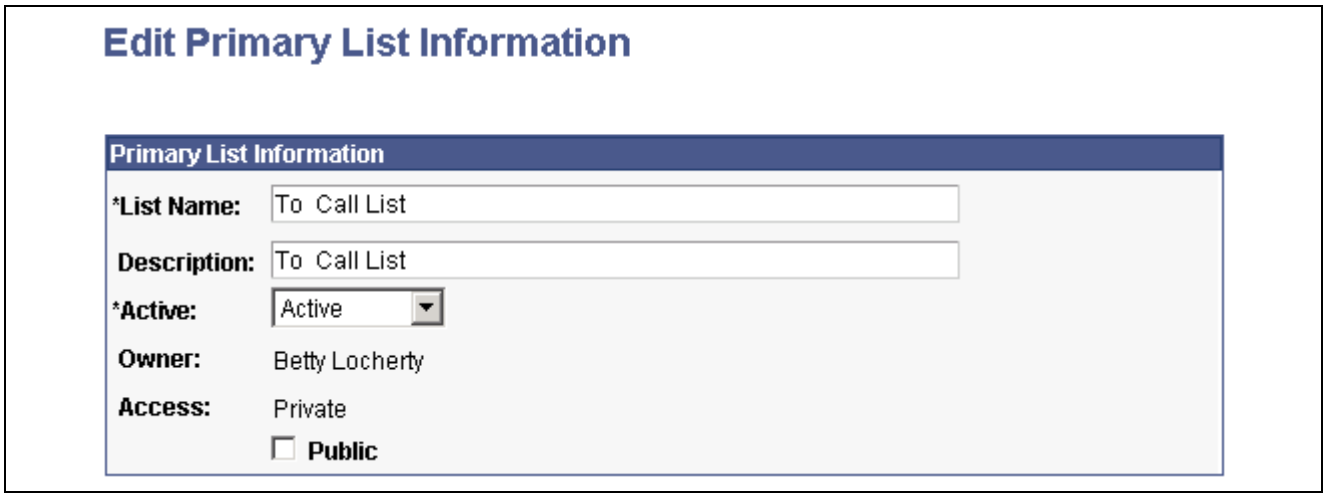
Applicants

Applicants and **Go** Click an applicant's name link to access the Manage Applicant page for that applicant.

Preferred Contact Displays the email address, phone number, or mailing address of the applicant, depending on the applicant's preferred contact method. Specify an applicant's preferred contact method on the Add New Applicant - Contact Details and Manage Applicant - Applicant Data: Contact pages.

Editing Primary Applicant List Data

Access the Edit Primary List Information page.



Edit Primary List Information page

Active Select *Active* or *Inactive.* When a list is inactive, only the list owner can view the list. You cannot add applicants to inactive lists.

Public Select to make the list a public list. Clear this check box if you want this list to be private.

Adding Applicants to Applicant Lists

Access the Select Applicant List page.

Select List Select the applicant list to which you want to add the applicant. All private applicant lists to which the recruiter is the owner and all public applicant lists appear in this field as valid options.

Creating Applicant Checklists

This section provides an overview of checklists and discusses how to create applicant checklists.

Understanding Checklists

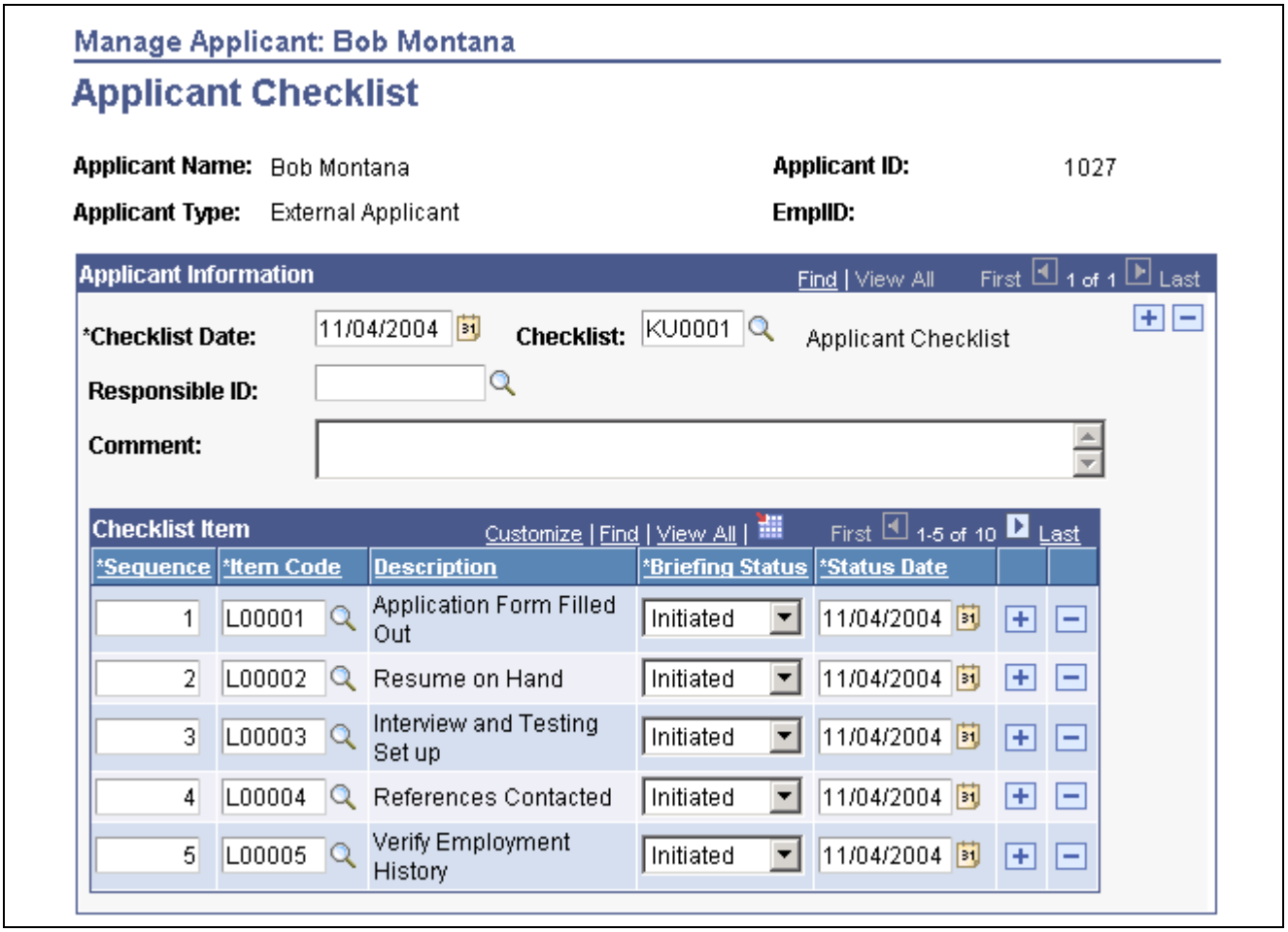
A checklist helps you remember all the details that you need to get applicants through the recruiting and hire process. You can use standard checklists that you create in the Checklist (CHECKLIST_TABLE) component or create an individualized checklist for a particular applicant for whom you're processing recruitment activities. When you hire an applicant, the checklists for that applicant are passed to PeopleSoft Enterprise Human Resources.

Pages Used to Create Applicant Checklists

Page Name	Object Name	Navigation	Usage
Find Applicants	HRS_REC_SCHAPP	Recruiting, Find Applicants, Find Applicants	Search for and select applicants.
Manage Applicant - Applicant Checklist	HRS_APP_CHKLST	Select *Manage Applicant Checklist* in the Take Action field for an applicant on the Find Applicants page.	Create a checklist for an applicant.

Creating Applicant Checklists

Access the Manage Applicant - Applicant Checklist page.



Manage Applicant - Applicant Checklist page

The fields on this page are the same as those on the Checklist Table page in PeopleSoft Enterprise Human Resources Administer Workforce.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, “Setting Up the Administer Workforce Business Process,” Creating Checklists.

Forwarding Applicants

This section provides an overview of applicant forwarding and discusses how to:

- Forward applicants.
- Find email addresses.

Understanding Applicant Forwarding

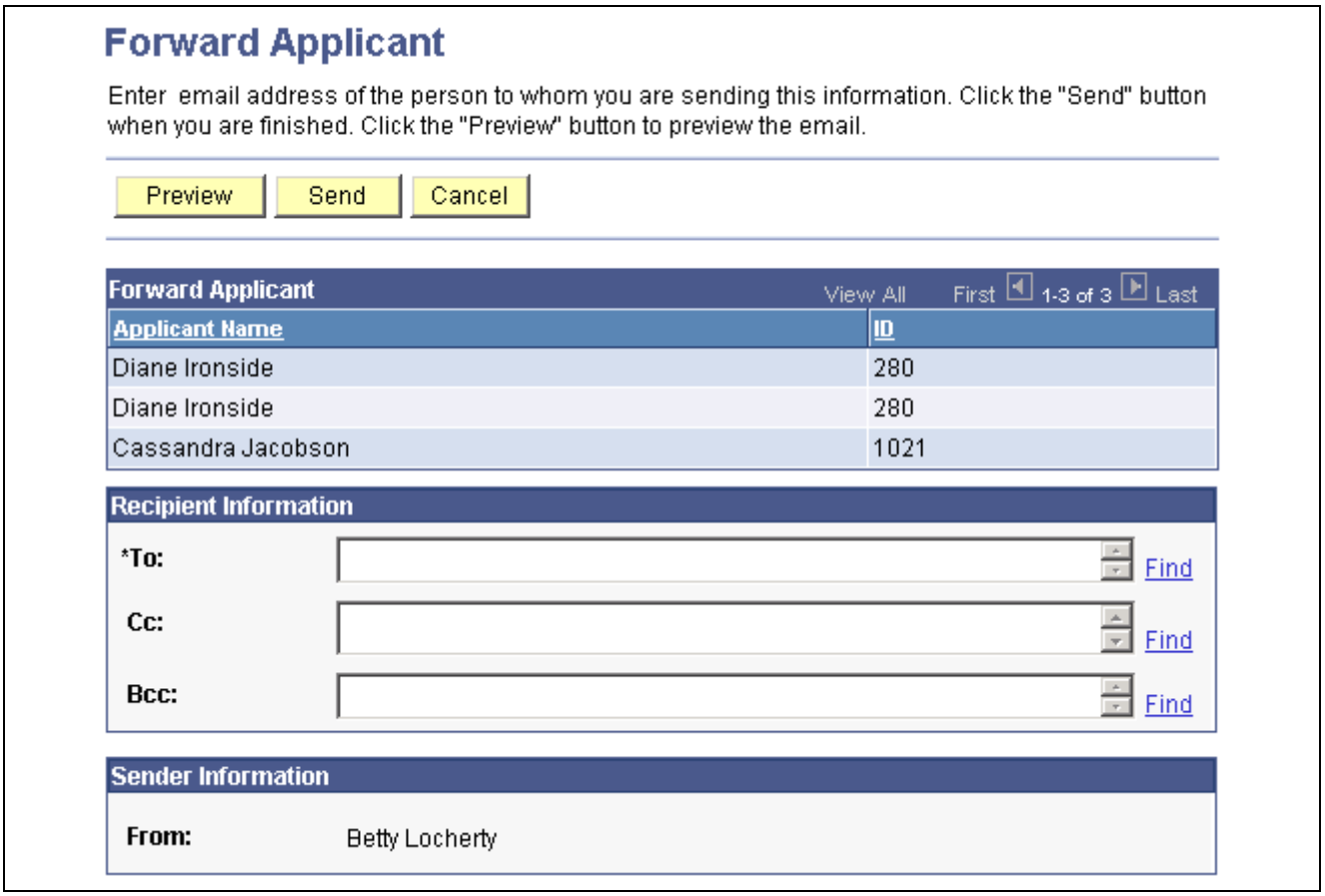
Recruiters can forward applicants to one or more persons to enable those persons to review the applicant. When recruiters forward an applicant, the system sends a notification (HRS_FORWARD_APPLICANT) to the persons to whom the recruiter specifies on the Forward Applicant page. Forwarding an applicant is similar to routing an applicant. However, when you forward an applicant, the system does not change the disposition status for the applicant. The system does, however, add an entry to the Contact History group box on the Manage Applicant - Contact Notes page.

Pages Used to Forward Applicants

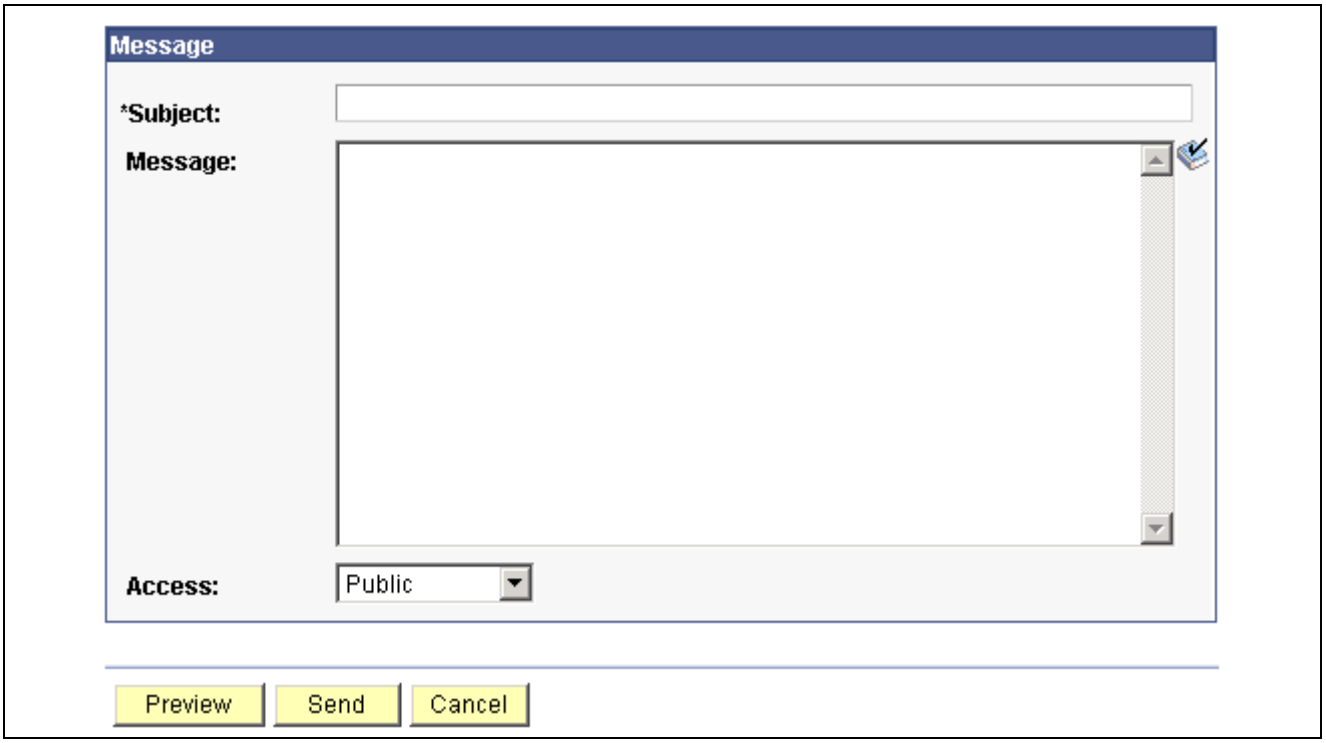
Page Name	Object Name	Navigation	Usage
Find Applicants	HRS_REC_SCHAPP	Recruiting, Find Applicants, Find Applicants	Search for and select applicants.
Forward Applicant	HRS_FWRD_APPL	Select *Forward Applicant* in the Take Action field for an applicant on the Find Applicants page.	Forward applicants.
Find Email Address	HRS_FND_EMAIL_ADDR	Click the Find link on the Forward Applicant page.	Search for and select employees to whom you want to forward applicants.
Forward Applicant Preview	HRS_FWRD_APP_PRVW	Click the Preview button on the Forward Applicant page.	Preview a message.

Forwarding Applicants

Access the Forward Applicant page.



Forward Applicant page (1 of 2)



Forward Applicant page (2 of 2)

Preview Click to access the Forward Applicant Preview page, where you can preview the email before you send it. To access the Forward Applicant Preview page, you must enter an email address and subject in the To and Subject fields.

Forward Applicant

This group box displays the name and ID of the applicants that you selected to forward.

Recipient Information

Use this group box to enter email addresses of the persons to whom you want to forward these applicants.

Find Click to access the Find Email Address page, where you can search for and select employees to whom you want to forward these applicants.

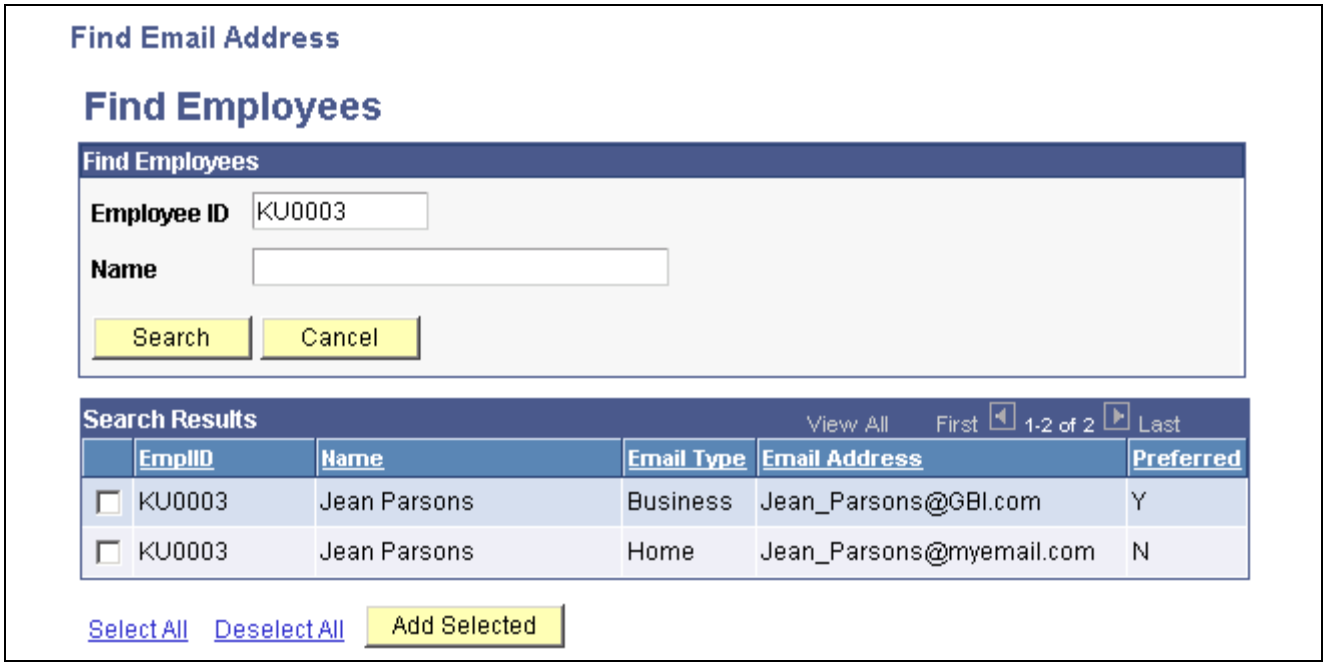
Message

Use this group box to enter a subject for the message that you are sending and the actual message.

Access Select *Public* or *Private.*

Finding Email Addresses

Access the Find Email Address page.



Find Email Address page

Find Employees

Enter a full or partial employee ID or name and click Search to display the search results.

Search Results

This group box displays the search results. Select one, several, or all employees in the search results and click Add Selected to add their email addresses to the appropriate fields on the Forward Applicant page.

Preferred Indicates whether this is the preferred email address for the employee. If an employee has multiple email addresses, the system lists all email addresses and indicates which email address is the preferred email address so that you can select the email address that is most appropriate.

Sending Emails and Letters

This section lists prerequisites and discusses how to send emails and letters.

Prerequisites

Before you can send emails , you must create generic templates by using the Generic Templates (WL_TEMPLATE_GEN) component. PeopleSoft delivers generic notification templates that you can use.

See Appendix A, "Delivered Workflows for Talent Acquisition Manager," page 423.

Before you can send letters, you must:

1. Set up letter codes that have a set letter code of *Recruiting Letters* on the Standard Letter Table page.

   See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up and Generating Form Letters," Setting Up Standard Letter Codes.

2. Create a Word template with tokens.

   Save the file as LTRxxx, where xxx is the letter code that you defined in step one.

3. Associate correspondence tokens with letter codes on the Letter Template Details page.

   You can view the correspondence tokens on the Correspondence Tokens page.

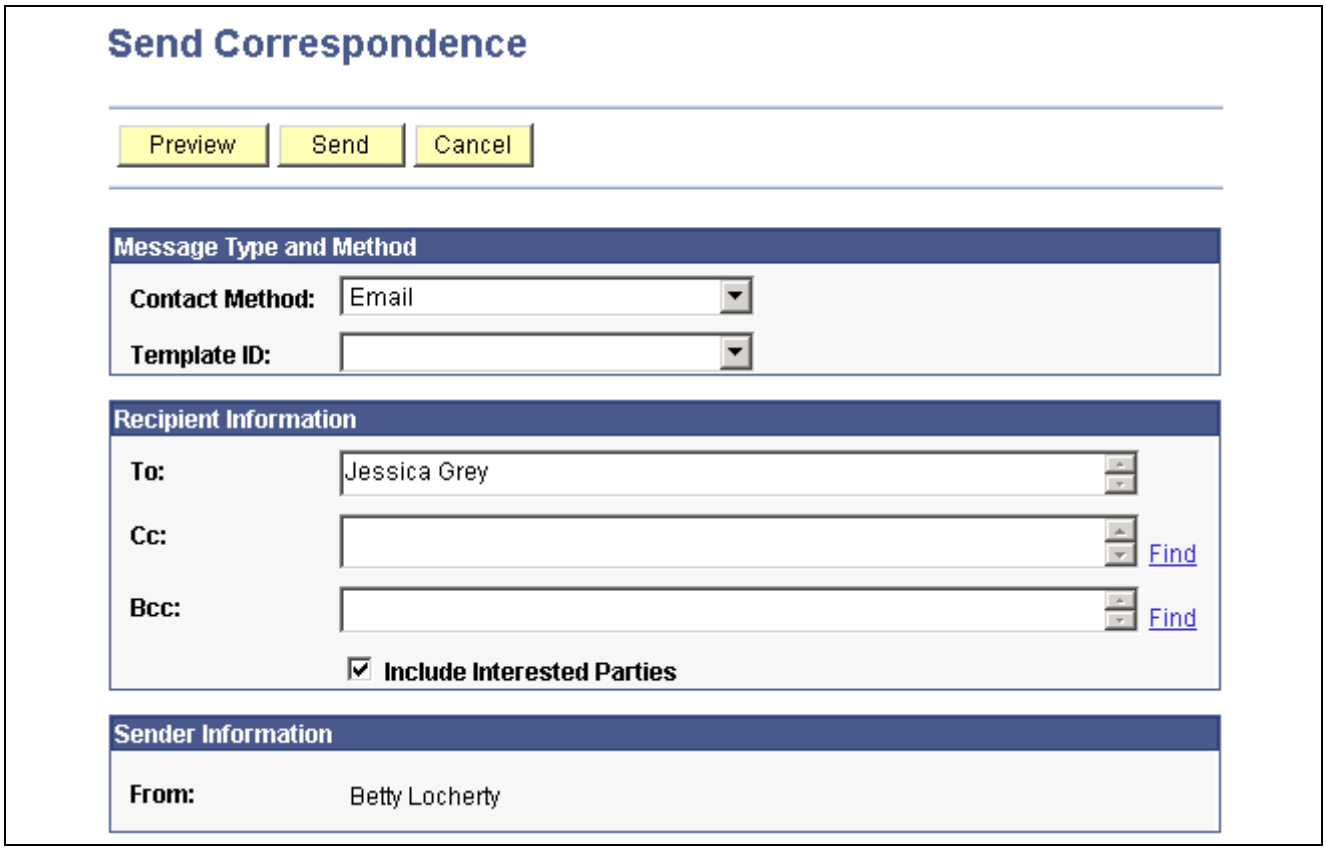
   See Chapter 2, "Setting Up the Recruiting Process," Setting Up Applicant Communications, page 17.

Pages Used to Send Emails and Letters

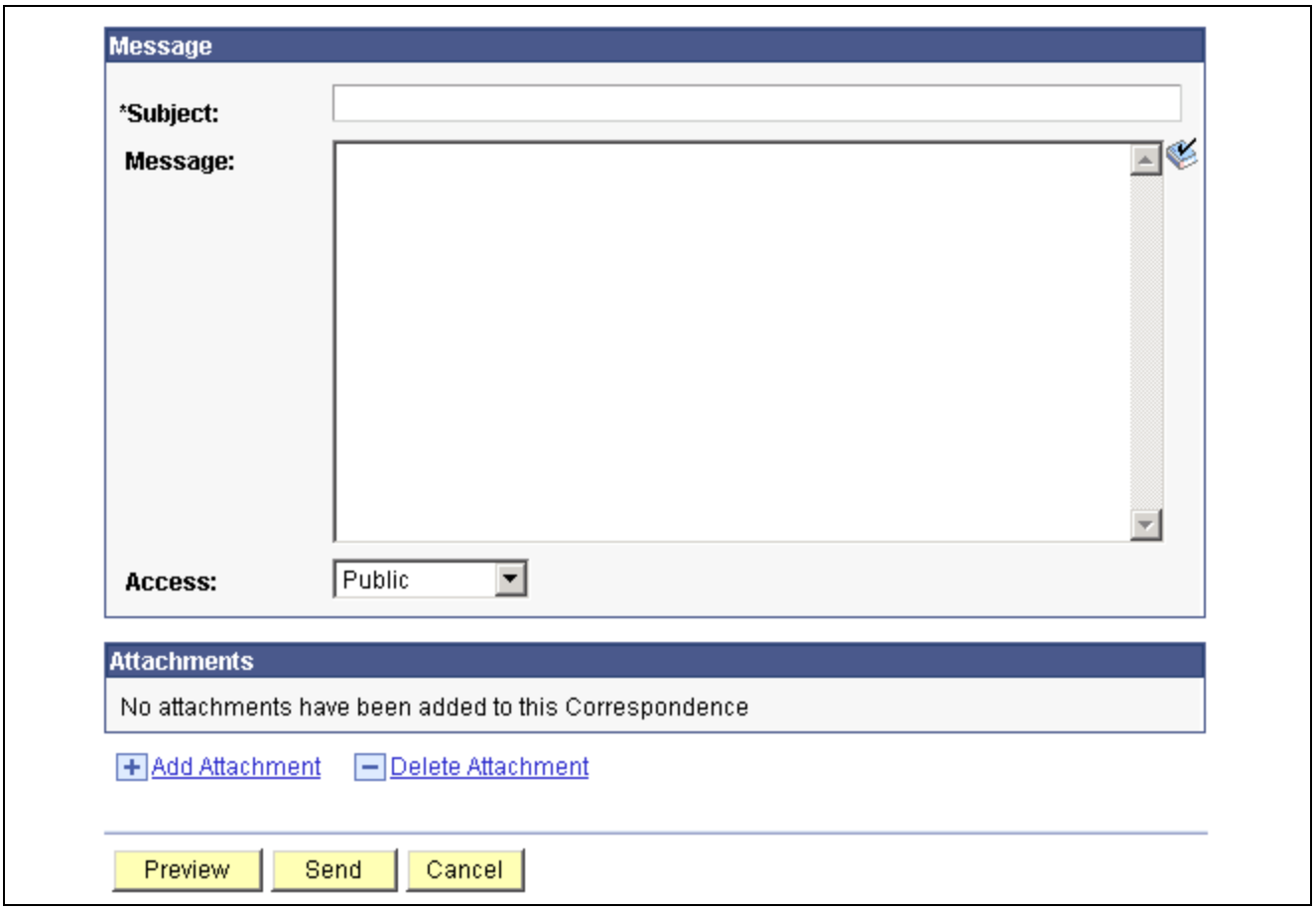
Page Name	Object Name	Navigation	Usage
Find Applicants	HRS_REC_SCHAPP	Recruiting, Find Applicants, Find Applicants	Search for and select applicants.
Send Correspondence	HRS_SEND_CRSP	Select *Send Correspondence* in the Take Action field for an applicant on the Find Applicants page.	Send emails and letters to applicants.

Sending Emails and Letters

Access the Send Correspondence page.



Send Correspondence page (1 of 2)



Send Correspondence page (2 of 2)

Message Type and Method

Contact Method Select *Email* to send an email or *Letter* to create and print a letter. The options on the page change depending on the value that you select.

Template ID Select a template ID. This field appears only when you select *Email* in the Contact Method field. Define templates by using the Generic Templates component.

Letter Code Select a letter code. This field appears only when you select *Letter* in the Contact Method field. Define letter codes on the Letter Template Details page.

Printer Enter a printer. The printer that you enter in the Printer Name field on the Recruiting Installation - Installation Options page appears here. You can change the printer that appears if needed. This field appears only when you select *Letter* in the Contact Method field.

Recipient Information

Use this group box to enter the names of the recipients of the correspondence.

Include Interested Parties Select to send the email to the interested parties that you specified on the Manage Applicant - Contact Notes page. This option appears only if you select *Email* as the contact method.

Sender Information

This group box displays the name of the person sending the correspondence.

Message

Use this group box to enter a subject and message.

Access Select *Public* or *Private.* When you send correspondence to an applicant, the system adds the correspondence information to the Contact History group box on the Manage Applicant - Contact Notes page. Only the user that sends a private correspondence can view that correspondence. All users that have access to the Manage Applicant - Contact Notes page for an applicant can view public correspondence.

Additional Page Elements

Preview Click to preview the email. This field appears only when you select *Email* in the Contact Method field.

Send Click to send the email. This field appears only when you select *Email* in the Contact Method field.

Print Click to print the letter. This field appears only when you select *Letter* in the Contact Method field.

Linking Applicants to Job Openings

This section provides an overview of how to link applicants to job openings, lists prerequisites, and discusses how to link applicants to job openings.

Understanding How to Link Applicants to Job Openings

If you find an applicant that is qualified for a specific job opening and should be considered, you can link the applicant to that job opening. When you link an applicant to a job opening, the system creates a new row on the Manage Applicant - Applicant Activity: Current Status page that you can use to track the applicant for that job opening and assigns a disposition status of Applied.

There are three ways to link an applicant to a job opening:

- Associate one or more job opening IDs with the applicant on the Link to Job Opening - Select Job Opening page.
- Associate one or more job opening IDs with the applicant on the Add New Applicant - Application Details page when you manually enter a new applicant.
- Associate one or more job opening IDs with the applicant on the Manage Applicant - Application Details page when you add or update applications for an existing applicant.

Prerequisites

Before you can link applicants to job openings, you must:

- Create job openings.

  See Chapter 8, "Creating Job Openings," Creating Job Openings, page 144.

- Enter applicants.

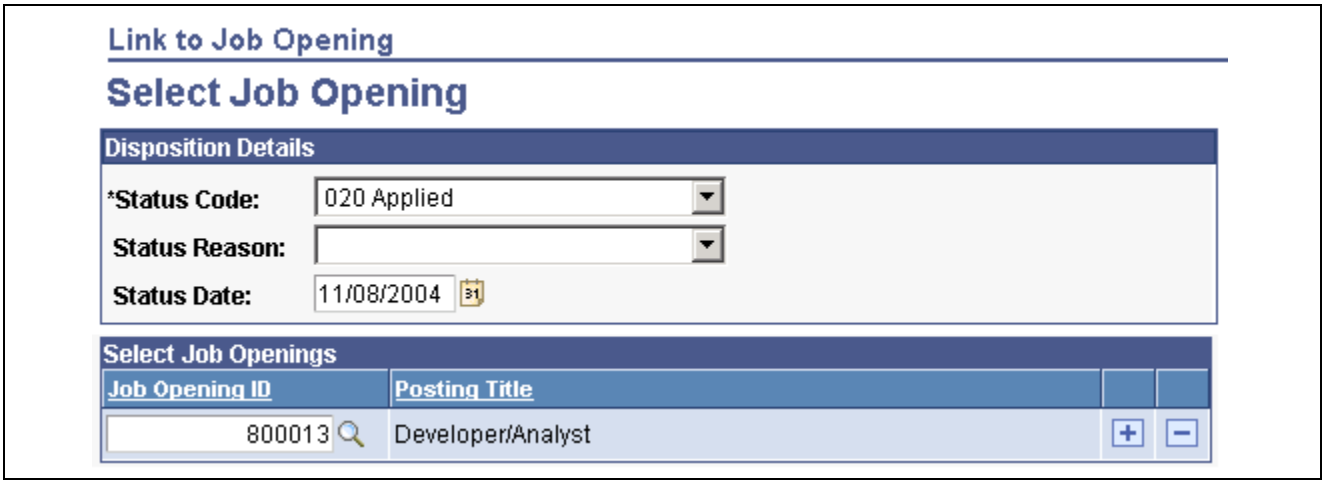
  See Chapter 9, "Entering Applicants," page 181.

Pages Used to Link Applicants to Job Openings

Page Name	Object Name	Navigation	Usage
Find Applicants	HRS_REC_SCHAPP	Recruiting, Find Applicants, Find Applicants	Search for and select applicants.
Link to Job Opening - Select Job Opening	HRS_GACT_RCM_STS	Select *Link Applicant to Job* in the Take Action field for an applicant on the Find Applicants page.	Link an applicant to a job opening.

Linking Applicants to Job Openings

Access the Link to Job Opening - Select Job Opening page.



Link to Job Opening - Select Job Opening page

Disposition Details

Use this group box to enter disposition details.

Status Code and **Status Reason** Select a status code and status reason. The default status code is *Applied.*

Status Date Enter a status date. The date that you enter appears in the Disposition History grid on the Manage Applicant - Disposition Details page.

Select Job Openings

Select the job openings to which you want to link the applicant. The job openings that a user can select depend on the security setup.

See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up and Administering HRMS Security," Activating Additional Security for Recruiting Solutions.

Changing Applicant Statuses

This section discusses how to change applicant statuses.

See Also

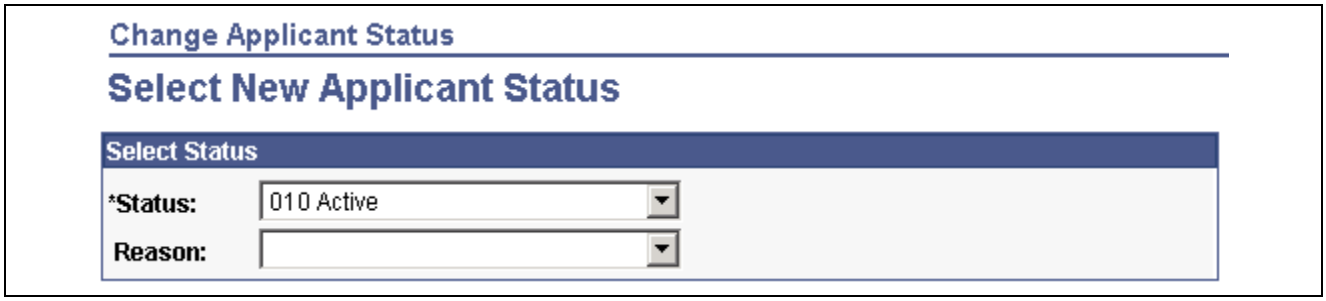
Chapter 4, "Setting Up Recruiting Statuses," page 55

Pages Used to Change Applicant Statuses

Page Name	Object Name	Navigation	Usage
Find Applicants	HRS_REC_SCHAPP	Recruiting, Find Applicants, Find Applicants	Search for and select applicants.
Change Applicant Status - Select New Applicant Status	HRS_GACT_RCM_STS	Select *Change Applicant Status* in the Take Action field for an applicant on the Find Applicants page.	Change an applicant's status.

Changing Applicant Statuses

Access the Change Applicant Status - Select New Applicant Status page.



Change Applicant Status - Select New Applicant Status page

Status Code Select a status code: *010 Active, 020 Hired, 030 Inactive, 040 Queued.* Define status codes on the Status/Reason Definition page.

Adding Persons of Interest

This section provides an overview of persons of interest and discusses how to:

- Select person of interest types and add persons of interest.
- View Search/Match results.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Understanding Organizational Relationships, Employment Record Numbers, and Multiple Jobs"

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up and Working with Search/Match"

Understanding Persons of Interest

Many organizations must add applicants to the HR system as persons of interest before the applicants are actually hired. For example, you might want to add an applicant to the HR system as an external trainee so that you can enroll the applicant in training prior to being hired. The option to add an applicant as a person of interest appears only for external applicants. You cannot add applicants that are employees or non-employees as persons of interest because they already exist in the HR system. When you add an external applicant as a person of interest, the system adds the applicant to the HR system and assigns an HR ID to the applicant.

To add an applicant as a person of interest:

1. On the Manage Applicant page, select *Add Person of Interest* from the Take Action field and click Go.

   The *Add Person of Interest* option appears only in the Take Action field for external applicants.

2. View Search/Match results on the Search Results page, depending on whether the system uses Search/Match functionality when you add persons of interest.

   If you select *Yes* for the Add Person of Interest option in the Search/Match group box on the Recruiting Installation - Installation Options page, the system checks to see if the applicant already exists in the HR database.

   If the system finds a match, the Search Results page appears. On the Search Results page, select Carry ID for the ID that matches and click Return. The Add Person of Interest page appears again, prompting you to confirm whether you want to add the applicant. On the Add Person of Interest page, click the Continue button to add the applicant as a person of interest.

3. Confirm that the applicant was added as a person of interest.

   When you add an external applicant as a person of interest, the system adds the EmplID field to the Manage Applicant - Applicant Data: Contact page and adds the applicant's HR ID number to the field.

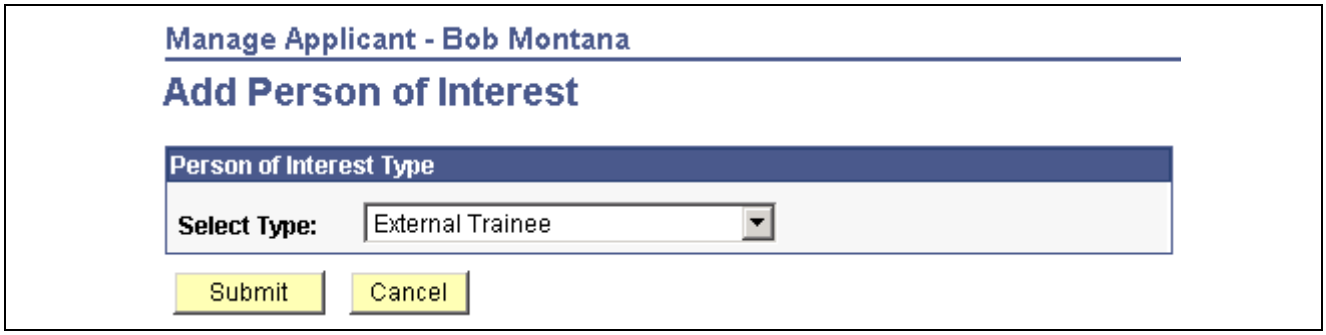
   See Chapter 17, "Managing Applicants," Editing Contact Information, page 348.

Pages Used to Add Persons of Interest

Page Name	Object Name	Navigation	Usage
Find Applicants	HRS_REC_SCHAPP	Recruiting, Find Applicants, Find Applicants	Search for and select applicants.
Manage Applicant	HRS_MANAGE_APP	Click an applicant name link in the Search Results grid on the Find Applicants page.	Manage an applicant.
Add Person of Interest	HRS_ADD_EXT_TRN	• On the Manage Applicants page, select *Add Person of Interest* in the Take Action field and click Go. • Click the Carry ID button and then the Return button on the Search Results page.	Select the person of interest type to which you want to assign the applicant when you add them to the HR database and add a person of interest.
Search Results	HCR_SM_RESULTS	• Click the Verify Employee ID link on the Manage Applicant - Prepare For Hire page. • Click the Submit button on the Add Person of Interest page.	View Search/Match results and investigate potential duplicate IDs.

Selecting Person of Interest Types and Adding Persons of Interest

Access the Add Person of Interest page.



Add Person of Interest page

Select Type Select the person of interest type that you want to assign to the applicant. Define person of interest types on the Person of Interest Type Tbl (person of interest type table) page.

See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up Organization Foundation Tables," Setting Up Person of Interest Types.

Viewing Search/Match Results

Access the Search Results page.

See Chapter 14, “Hiring Applicants,” Reviewing Search/Match Results, page 312.

Processing Duplicate Applicants

This section provides an overview of duplicate applicant processing and discusses how to:

- View process statuses.
- Define search criteria.
- Merge duplicate applicant records.

Understanding Duplicate Applicant Processing

It is possible for an applicant to be entered more than once with different applicant IDs. Duplicate applicant records can occur when applicants apply to the organization more than once and send different information each time or submit their applications using different methods. Having the same applicant referenced with multiple applicant IDs is confusing for hiring managers and recruiters. Talent Acquisition Managers enables recruiters to identify and merge duplicate applicant records into one applicant record.

To process duplicate applicant records:

1. Define search criteria on the Find Duplicate Applicants page.
2. Run the Find Applicant Duplicates Application Engine process (HRS_DUPE_PRC).

   This process finds potential duplicate applicant records that match the search criteria that you define on the Find Duplicate Applicants page. The search is case-sensitive on email, addresses, and middle name. The process runs against active applicant records only. It ignores inactive applicant records. For the system to consider two applicants a match, all search criteria that you define on the Find Duplicate Applicants page must match exactly. Any duplicate email addresses, phone, and national ID numbers, regardless of type, is identified as potential duplicate records. For example, if one applicant has "john@provider.com" as his work email address and another applicant has "john@provider.com" as his home email address, the system counts this as a potential match regardless of the fact that the address types (work vs. home) are different.
3. View and identify duplicate applicant records on the Review Duplicate Applicants page.

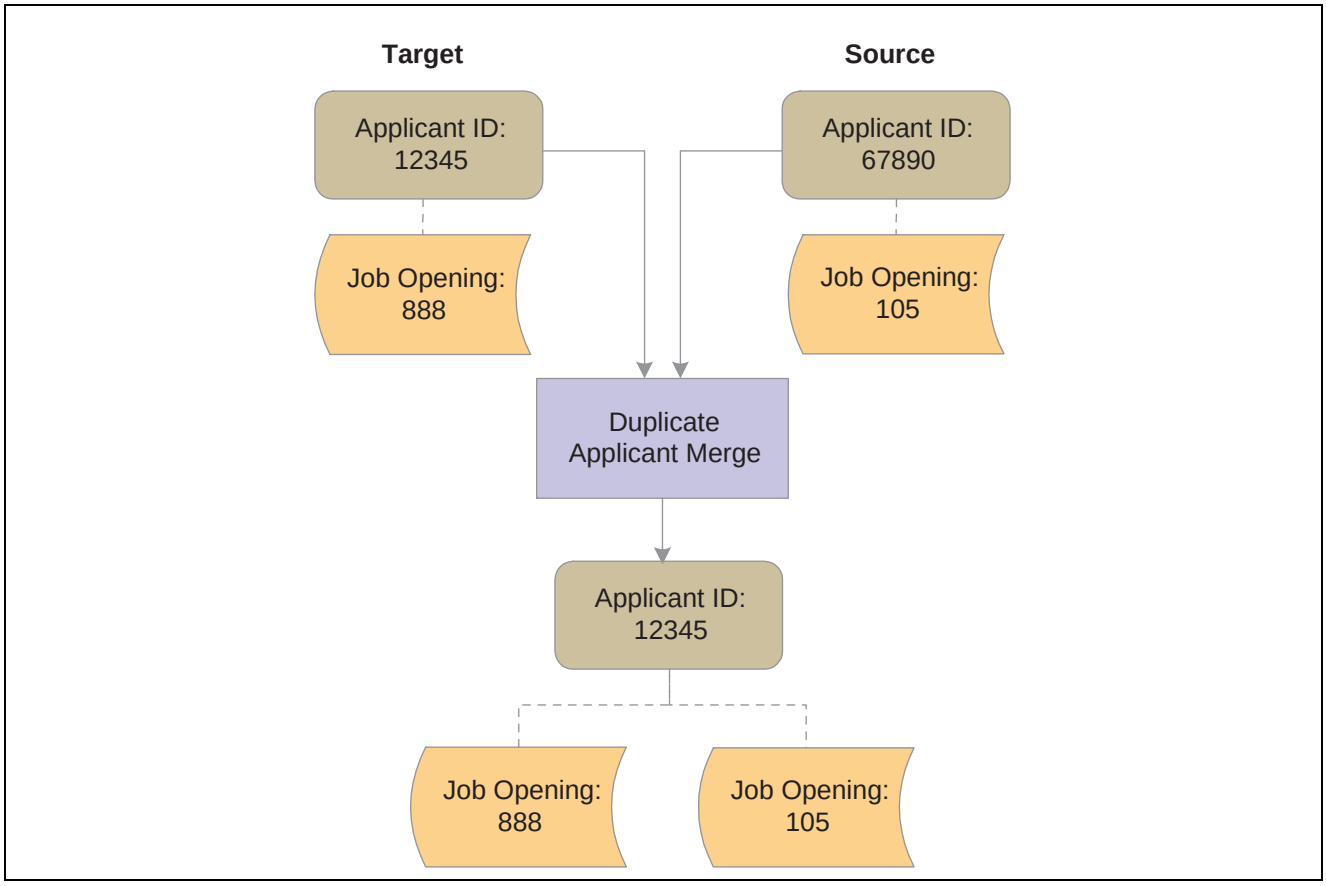
   The system groups each set of potential duplicate applicants into duplicate sets. If you determine that the applicants in the duplicate set are actually duplicates, you must mark the applicant records as targets and sources. The source applicant records are merged into the target applicant records. For each duplicate set, there can be multiple source and target records.
4. Run the Duplicate Applicant Merge Application Engine process (HRS_DUPE_MRG).

   This process merges the source applicant records into the target applicant record. This process also sets the source applicant records to Inactive. The system updates the target record with the most current contact information (first name, middle name, last name, address, phone numbers, email addresses) and identity and eligibility data. If there is no data on the target record, but there is data on the source record, the system uses the data on the source record to update the target record. If data on the source and target records has the same effective date, the system does not change the data on the target record.

All unique recruitment rows from the source records are added to the target record so that there is no loss of data. This includes interview schedules, interview evaluations, contact notes, expenses, interested parties, references, and referral sources.

Note. If you select internal applicants (employees and non-employees), the system deletes or modifies the applicant data only. Information held in Personal Data tables is not modified or deleted.

This diagram illustrates the Duplicate Applicant Merge process:



Duplicate Applicant Merge process

Pages Used to Process Duplicate Applicants

Page Name	Object Name	Navigation	Usage
Process Duplicate Applicants	HRS_DUPE_PRCS	Recruiting, Administration, Process Duplicate Applicants, Process Duplicate Applicants	View process statuses.
Find Duplicate Applicants	HRS_DUPE_FIND	• Click the Create New Search button on the Process Duplicate Applicants page. • Click a link in the Status column on the Process Duplicate Applicants page.	Define search criteria and search for duplicate applicants.
Review Duplicate Applicants	HRS_DUPE_REVIEW	Click the View Duplicates link on the Process Duplicate Applicants page.	Merge duplicate applicant records.

Viewing Process Statuses

Access the Process Duplicate Applicants page.



Process Duplicate Applicants page

Create New Search Click to access the Find Duplicate Applicants page, where you can select new duplicate applicant search criteria and run the Find Applicant Duplicates process.

Refresh Click to refresh the status links with the current status of the process.

Status Displays the status of the process instance. Click a status link to access the Find Duplicate Applicants page, where you can review the duplicate applicant search criteria used for the process.

Values are:

Closed: Indicates that the search is closed. The system assigns this status to queued or pending processes when you run the Find Applicant Duplicates process for a new process. Only one process can be active at a time. This

ensures data integrity and avoids process conflicts among target and source applicants during the merge.

Merge Completed: Indicates that the Duplicate Applicant Merge process is complete.

Review In Progress: Indicates that the results of the Find Applicant Duplicates process are being reviewed. The system assigns this status when you click the View Duplicates link for the process.

Search Completed: Indicates that the Find Applicant Duplicates process is complete but that the results have not been reviewed.

Search In Progress: Indicates that the Find Applicant Duplicates process is in progress.

Search Requested: Indicates that the Find Applicant Duplicates process is initiated.

View Duplicates Click to access the Review Duplicate Applicants page, where you can identify duplicate sets and merge duplicate applicant records. This link appears after the Find Applicant Duplicates process is complete.

Defining Search Criteria

Access the Find Duplicate Applicants page.

Select the data that must be identical for applicants to be considered as duplicates. By default, the system automatically selects the search criteria that the user used for the previous search.

Phone, Email, and **National ID** Select to search for matching phone numbers, email addresses, and national IDs. For these search criteria, the system ignores the phone, email, and national ID types. For example, if two applicants have the same email address but the email type is different, the system still flags the applicants as potential duplicates.

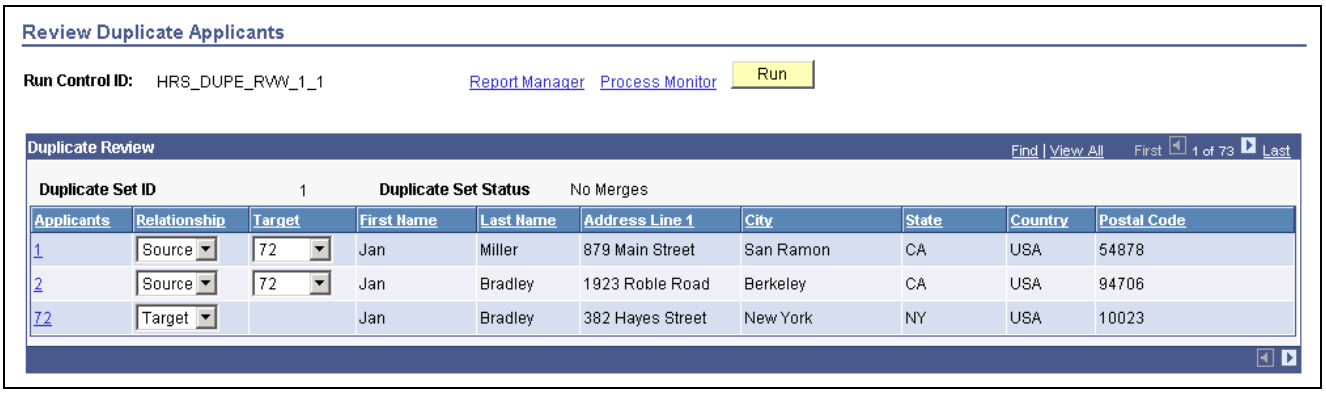
Click Run to run this request. PeopleSoft Process Scheduler runs the Find Applicant Duplicates process at user-defined intervals.

See Also

PeopleTools 8.45 PeopleBook: Using PeopleSoft Applications

Merging Duplicate Applicant Records

Access the Review Duplicate Applicants page.



Review Duplicate Applicants page

Click Run to run this request. PeopleSoft Process Scheduler runs the Duplicate Applicant Merge Application Engine process (HRS_DUPE_MRG) at user-defined intervals.

Note. After you start the Duplicate Applicant Merge process, you cannot cancel it. You must be certain that you want to merge the applicant records before you schedule the process.

You can do partial runs of the process. For example, you can run the process for the first 10 duplicate sets and then the rest at a later time.

Duplicate Review

Use this group box to specify how the system merges duplicate applicant records. Applicants with matching data are grouped into duplicate sets. Review each set and decide if the applicant records are duplicates.

Duplicate Set ID Displays the ID number for the duplicate set.

Duplicate Set Status Displays the status of the merge process. Values are:

No Merges: Indicates that the system has not merged duplicate applicant records for the duplicate set.

Merged: Indicates that the system has merged duplicate applicant records for the duplicate set.

Applicants Click the applicant ID link to access the Manage Applicant page, where you can view additional details for the applicant. Click the Applicant List link to return to the Review Duplicate Applicants page.

Relationship Specify how the applicant records are merged. Values are Source and Target. For each duplicate set, there can be multiple source and target records. You cannot edit these fields after you run the Duplicate Applicant Merge process.

Leave these fields blank if you determine that the applicants in a duplicate set are not duplicates.

Target Select the target for the source. The applicant ID for the applicant marked as the target in the Relationship column appears as a valid value. This column appears on the page only after you select *Source* in the Relationship column for an applicant.

See Also

PeopleTools 8.45 PeopleBook: Using PeopleSoft Applications

Generating a Candidate Listing Report

This section lists the page used to generate a Candidate Listing report.

Page Used to Generate a Candidate Listing Report

Page Name	Object Name	Navigation	Usage
Candidate Listing - Run Control	PRCSRUNCNTL	Recruiting, Reports, Candidate Listing, Run Control	Generate a Candidate Listing report, which you can use to view job opening information with a list of the candidates being interviewed for the positions. The report groups job openings by department ID.

Generating an Applicant Summary by Job Report

This section lists the page used to generate an Applicant Summary by Job report.

Page Used to Generate an Applicant Summary by Job Report

Page Name	Object Name	Navigation	Usage
Applicant Summary by Job - Run Control	PRCSRUNCNTL	Recruiting, Reports, Applicant Summary by Job, Run Control	Generate the Applicant Summary by Job report, which you can use to view the number of applicants and percentage of total applicants that applied to a job opening, sorted by source type and specific source.

Generating an Applicant Summary by Source Report

This section lists the page used to generate an Applicant Summary by Source report.

Page Used to Generate an Applicant Summary by Source Report

Page Name	Object Name	Navigation	Usage
Applicant Summary by Source - Run Control	PRCSRUNCNTL	Recruiting, Reports, Applicant Summary by Source, Run Control	Generate the Applicant Summary by Source report, which you can use to view the number of applicants and percentage of total applicants sorted by source type and specific source (regardless of job opening).

Generating a Job Group Movement Analysis Report

This section lists the page used to generate a Job Group Movement Analysis report.

Page Used to Generate a Job Group Movement Analysis Report

Page Name	Object Name	Navigation	Usage
Job Group Movement Analysis	RUN_CNTL_REG_INTRO	Recruiting, Reports, Job Group Movement Analysis, Job Group Movement Analysis	Generate the Job Group Movement Analysis report, which you can use to generate racial and gender demographic data regarding the hiring process. This report provides an analysis of the number of males and females by ethnic group who were applicants, hires, promotions, or terminations during a specified time period. The report shows which sex and ethnic groups are moving in and out of the organization and which groups are offered opportunities for advancement.

CHAPTER 18

Managing Resumes

This chapter provides an overview of resume management and discusses how to:

- Load resumes.
- Manage resumes.

Understanding Resume Management

This section discusses:

- Channels.
- Resume extraction process.
- Resume statuses.

Channels

Applicant resumes can come into the Recruiting Solutions system from one of these channels:

- Email.
- Resume Load Process Application Engine process (HRS_RESLOAD).
- Open Integration Framework (OIF).
- Apply online.
- Add New Applicant (HRS_ADD_APPLICANT) component.

Resume Management supports all resume document formats and will accept HR-XML resumes from all channels. However, only OIF uses the data within the HR-XML document to directly write data to Recruiting Solutions tables. The other processes route the document to a resume extractor for processing. Not all resume extractors support all resume document formats. If the resume extractor doesn't support the resume document format, the resume extraction process fails.

Email

Applicants and staffing suppliers can email resumes to a designated email address that you set up.

See Chapter 5, "Setting Up Third Party Integrations," Setting Up Resume Email Accounts, page 108.

Resume Load Process Application Engine Process (HRS_RESLOAD)

The Resume Load Process enables organizations to load resumes that it receives.

See Chapter 18, "Managing Resumes," Loading Resumes, page 382.

Open Integration Framework

OIF is used to receive web services from staffing suppliers (job boards, recruitment agencies, and services procurement providers) which may contain either a candidate HR-XML or an unstructured resume as an attachment. For example, a recruitment agency that your organization integrates with can send XML resumes through the OIF. Because the agency sends an XML resume file, the system does not need to perform any extraction. Instead, the system uses the data directly from the XML resume file to process through Recruiting Solutions. Although no extraction is performed on the XML resumes, the resumes still go through data mapping and any other business process that you have set up for the staffing supplier.

When a staffing supplier submits a resume, it is common not to contact the applicant to whom the resume belongs. Instead, all communication with the applicant, up until the interview with the applicant, is done through the staffing supplier. The person at the staffing supplier organization who handles this duty is referred to as a proxy. The proxy takes on all responsibilities of the applicant and is both responsible and expected to act in the best interest of the applicant. On system pages that show applicant contact information, the contact information for the proxy is also included. When you send correspondence to an applicant that uses a proxy, the system sends the correspondence to the proxy, not the applicant.

To use OIF to receive resumes, the staffing supplier organization must set up web services and deliver the configuration file that you will use to set up the vendor.

To set up OIF to receive incoming candidates in Talent Acquisition Manager:

1. Set up the vendor.

   See Chapter 5, “Setting Up Third Party Integrations,” Setting Up Recruiting Vendors, page 82.

2. Set up a recruitment source and link the vendor to the source.

   The system determines how to process the resumes based on the settings that you specify for the recruitment source on the Vendor page in the Source Setup (HRS_SOURCE_SETUP) component. For example, the system checks the Vendor page for the source from which it receives a resume to determine which status to assign to the resume.

   When you set up contacts for the source, you can specify which contact to use as the proxy. If you do not specify a contact to use as a proxy, the contact setup is used only for informational purposes.

   See Chapter 5, “Setting Up Third Party Integrations,” Setting Up Recruitment Sources, page 97.

Apply Online

Internal and external applicants can use PeopleSoft Enterprise Candidate Gateway to apply for job openings online.

See *PeopleSoft Enterprise Candidate Gateway 8.9 PeopleBook*, “Using Candidate Gateway,” Applying for Job Openings.

Add New Applicant Component

Recruiters and hiring managers can enter applicant data manually by using the Add New Applicant component.

When recruiters and hiring managers manually enter data for an applicant, they have the option to attach a resume. The data in the resume is not extracted or used to automatically populate fields in the Add New Applicant component. However, the creation of these applicants is tracked in the Manage Resumes component.

See Chapter 9, “Entering Applicants,” page 181.

Resume Extraction Process

Resume extractors extract data from applicant resumes and move the data into Recruiting Solutions tables. Organizations can use multiple resume extractors. For example, you can use a different resume extractor for each country in the organization, or you can use different resume extractors for each recruitment source from which you receive resumes.

The resume extractor that the system selects to use depends on the resume extractor that you specify for a recruitment source, a site, or the extractor that you specify when you run the Resume Load Process or run an extraction from the Manage Resumes (HRS_AL_LOG) component. If an applicant attaches their resume to their online application in Candidate Gateway, the system uses the resume extractor that is specified on the Site - Setup Site page for that online application site. If the resume comes from a specific recruitment source; for example, a recruiting agency, the system uses the resume extractor that you specified in the Source Setup component when you set up the recruitment source. When you load resumes by using the Resume Load Process, you select which extractor to use when you run the process.

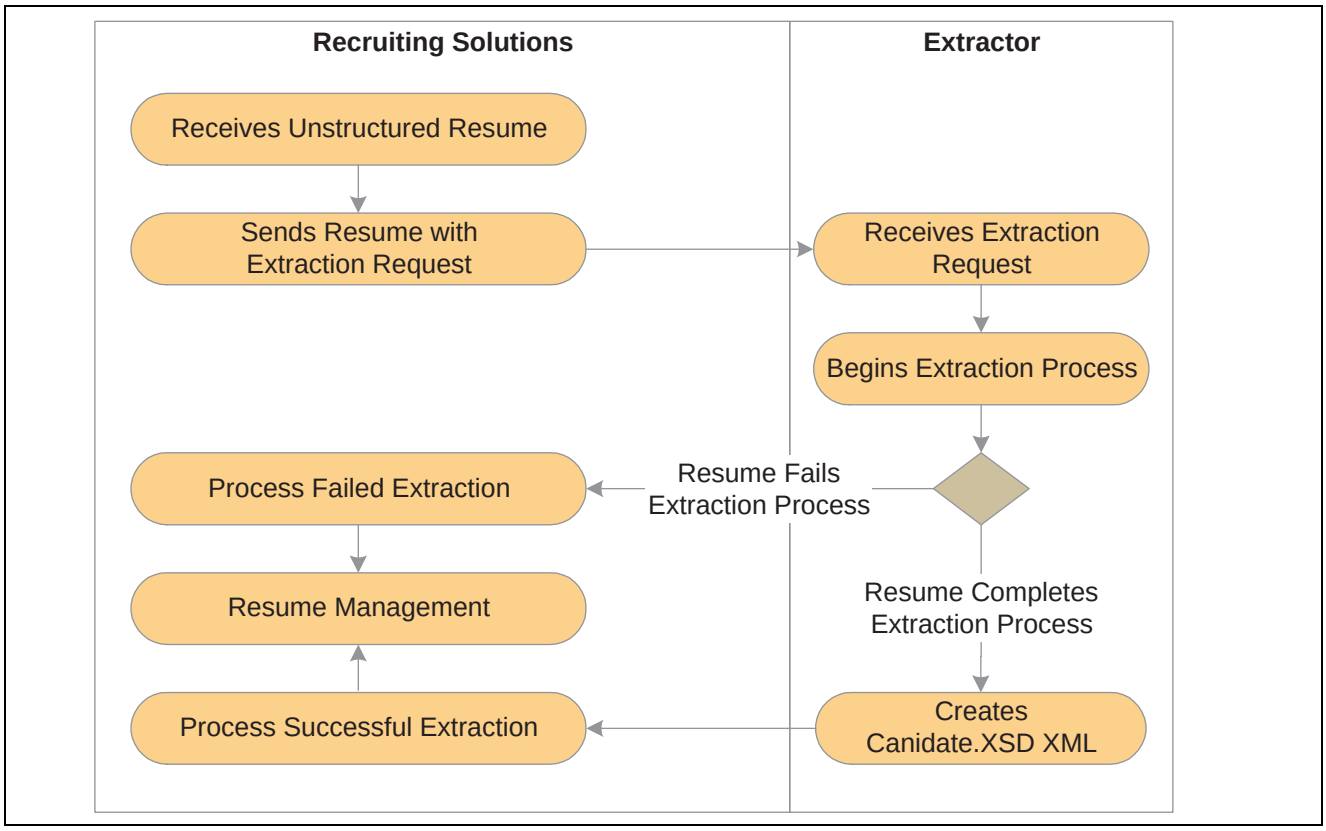
Resume extractors extract data from an applicant's resume. Not all extractors extract the same data. PeopleSoft software supports the following data from the extractors:

- Contact information: applicant name, home address, telephone numbers, and email address.
- Prior work experience.
- Secondary education.
- Qualifications including licenses and certificates, languages, memberships, honors and awards, and competencies.
- Referrals.
- Full resume text.

Upon successful extraction, the system creates a record for the applicant in the Manage Applicant component, and populates fields in the Manage Applicant component for the applicant. The system also assigns the applicant an applicant ID, a status, a resume name, adds the original resume as an attachment, and associates any job openings that might be applicable. If the applicant attaches a resume when they apply online through Candidate Gateway, the resume extractor populates fields in the applicant's online application and referrals. Of course, this presumes that the extractor actually extracted this data.

Note. The resume extraction process isn't required for applicants to apply for job openings online by using Candidate Gateway.

This process flow shows the resume extraction process:



Resume extraction process

Resume Statuses

The system assigns a status, or resolution state, to each resume that it receives. For resumes from recruitment sources that are a Vendor type, the system uses the settings that you define on the Vendor page in the Source Setup component to determine which status to assign to the resume. For the Resume Load Process, the system uses the run parameters that you set up to determine what statuses to assign.

The resume status of a resume is different than the extraction status of the resume. The extraction status of a resume can be either Success or Fail. In general, a resume that fails an extraction process is automatically set to either a Rejected or Unresolved resume status, and resumes that are successfully extracted are set to either a Success or Draft resume status, depending on the business rules that you set up for the recruitment source or the parameters that you select when you run the Resume Load Process.

When the system receives a resume through OIF, the resume extraction process might not be involved. However, the resume status is still applicable. For example, if the system receives a Candidate-XML message directly from a recruiting agency through OIF that is already parsed (extracted), the system does not send it to a resume extractor. However, the system does run the resume through the autoscreening rules that an organization sets up for the recruitment source.

This table describes resume statuses:

Resume Status	Description	Default Applicant Status
Awaiting Resolution	Indicates that the resume is in the database but has not yet been processed through a resume extractor.	Not applicable. Applicant data is not created until the resume is extracted.

Resume Status	Description	Default Applicant Status
Unresolved	Indicates that the resume requires an administrators attention to move the resume into a Rejected or a Success resume status. Resumes in the Unresolved state can be reprocessed through an extractor, the associated applicant data for these resumes can be manually modified, and then the administrator can set the resume to a Success or Reject status.	Queued
Rejected	Indicates that the system rejected the resume and has set the associated applicant's status to Inactive if the system created an applicant. A resume can be rejected for several reasons. PeopleSoft software supports two types of automatic rejection. First, resumes that are not successfully extracted can automatically be set to the Rejected status. Second, the autoscreening setup for the recruitment source can determine that a resume/applicant fails the Rejected status autoscreening definition and automatically set the resume status to Rejected. Finally, a user can manually set the resume status to Rejected from the Manage Resumes component.	Inactive

Resume Status	Description	Default Applicant Status
Draft	Indicates that the resume requires the associated applicant's attention to move the resume into a Success state. The associated applicant's status is set to Queued. Resumes in the Draft state can be reprocessed through an extractor, the associated applicant data for these resumes can be manually modified, and then the administrator can set the resume to a Success or Reject status. Assigning a Draft status typically requires that the applicant validate their extracted resume data via the online application pages in Candidate Gateway. When the applicant submits the corresponding resume online, the status is updated to Success. If applicants do not validate their resume data, the resume stays in Draft status unless an administrator intervenes.	Queued
Success	Indicates that the resume is successfully extracted and the resume's associated applicant has been set to Active and is ready to continue through the recruitment business processes. When an applicant uses the resume extraction process through Candidate Gateway when they apply for jobs online, the resume status for that resume defaults to Success.	Active

See Chapter 5, "Setting Up Third Party Integrations," Defining Business Rules for Incoming Resumes, page 104.

Loading Resumes

This section provides an overview of the Resume Load Process, lists prerequisites, and discusses how to load resumes.

Understanding the Resume Load Process (HRS_RESLOAD)

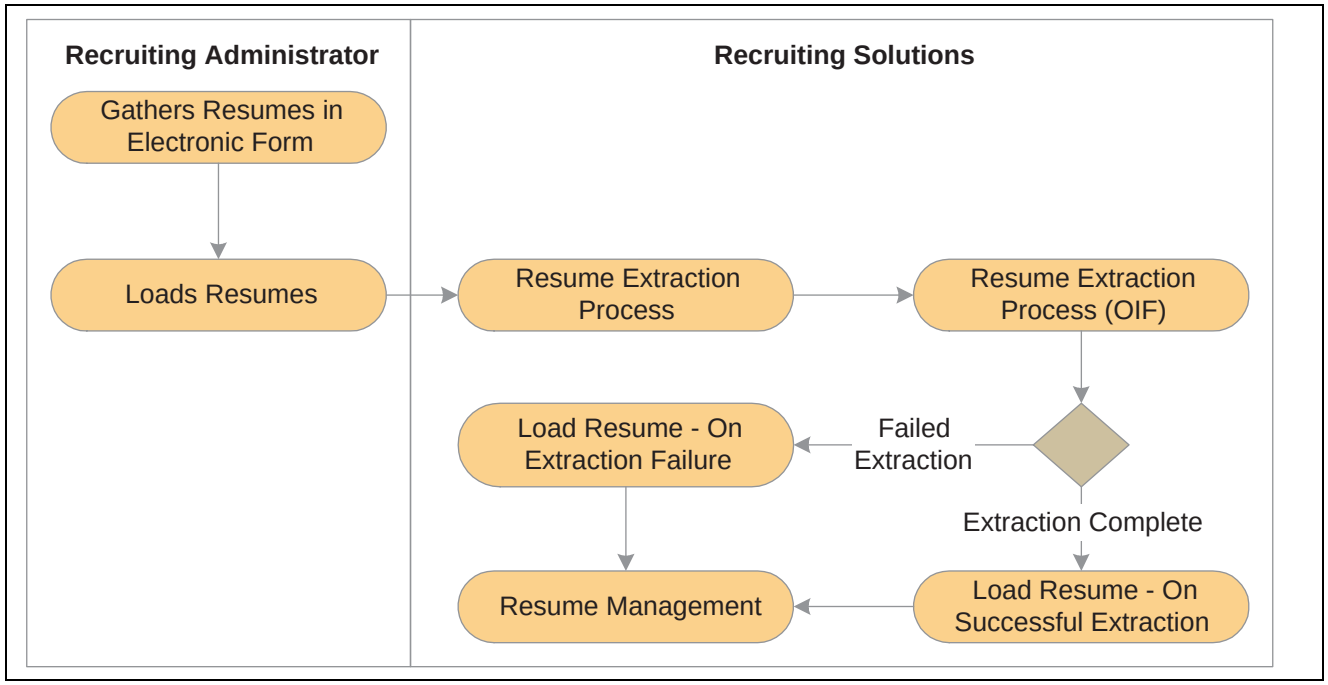
The Resume Load Process enables organizations to load resumes that it receives in electronic formats. The electronic formats that the system can accept are limited only by the resume extractor that you select to use for the process. You can also use the Resume Load Process to upload paper resumes that you receive, after you transform the paper resumes into an electronic format.

When you set up the process you can specify the resume extractor that you want the system to use, parameters for the resume extractor, the site ID to which you want to redirect applicants, the source to which you want to associate resumes, the statuses that you want to assign to the resumes upon a failed or successful extraction, and the job openings that you want to associate to the applicants. You must browse for and upload the resumes that you want to use in the process. You can upload individual resume documents, or you can upload a zip file that contains multiple resumes.

When you run the process, the system sends the resumes to the resume extractor to parse. After the Resume Load Process completes, you can use the Manage Resumes component to view the status of each of the resumes.

See Chapter 18, "Managing Resumes," Managing Resumes, page 387.

This diagram shows the Resume Load Process:



Resume Load Process

Prerequisites

Before you can load resumes using the Resume Load Process, you must:

- Set up resume extractor vendors.

  See link to resume extractor vendor setup in TAM

- Set up site IDs.

  See *PeopleSoft Enterprise Candidate Gateway 8.9 PeopleBook*, "Setting Up Candidate Gateway," Setting Up Sites.

- Set up sources and subsources if you want to associate the resumes with a source.

  See Chapter 5, "Setting Up Third Party Integrations," Setting Up Recruitment Sources, page 97.

- Create job openings if you want to associate applicants with a job opening.

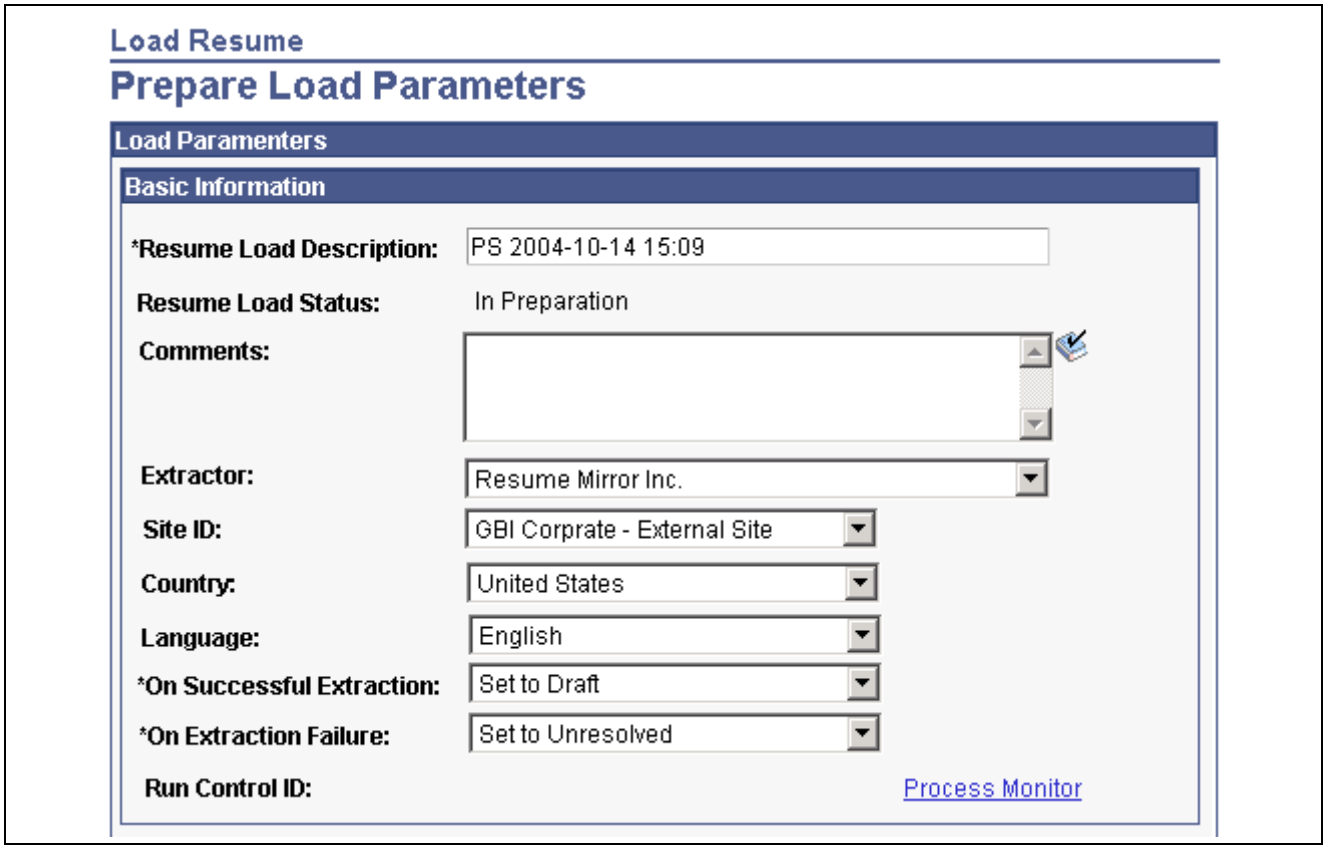
  See Chapter 8, "Creating Job Openings," Creating Job Openings, page 144.

Page Used to Load Resumes

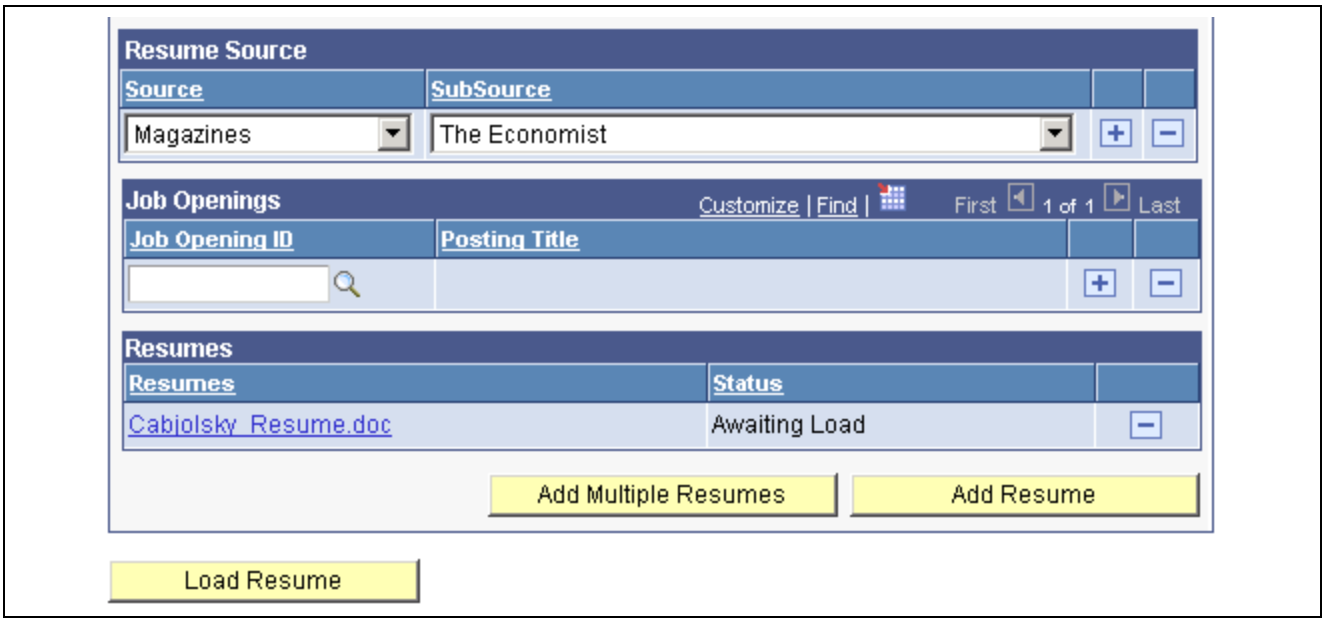
Page Name	Object Name	Navigation	Usage
Load Resume - Prepare Load Parameters	HRS_RESLOAD	Recruiting, Administration, Load Resume, Load Resume - Prepare Load Parameters	Load resumes.

Loading Resumes

Access the Load Resume - Prepare Load Parameters page.



Load Resume - Prepare Load Parameters page (1 of 2)



Load Resume - Prepare Load Parameters (2 of 2)

Basic Information

Use this group box to specify basic load parameters for the Resume Load Process. The system remembers the settings that you specify in this group and uses the settings for the next process, except for the value in the Resume Load Description field, which is dynamic, and the Comments field. You can change the defaulted load parameters each time that you run process.

Resume Load Description The system populates this field with the user ID of the person logged in to the system along with the current date and time. You can edit the description if needed.

Resume Load Status Displays the status of the Resume Load Process. Values are:

In Preparation: Indicates that the process has not started. The system displays this status until you click the Load Resumes button.

Load in Progress: Indicates that the process is in progress. The system displays this status after you click the Load Resumes button and before the process completes.

Loaded: Indicates that the process is complete. The system displays this status after all resumes are processed.

Comments Enter comments. These comments appear only on this page and are used only for informational purposes.

Extractor Select the resume extractor that you want the system to use. Only active vendors from the ResumeExtractor transaction group appear in this prompt. Define vendors by using the Vendor Setup (HRS_VENDOR_SETUP) component.

Site ID Select a site ID where you want to redirect applicants. Define sites on the Site - Site Setup page.

Country Select a country. Some resume extractors require a country to begin the extraction process.

Language Select the language in which the resumes are written. This is an optional field. Some resume extractors use this language for the extraction process, however, other extractors ignore this field.

On Successful Extraction Select the status that you want the system to assign to the resume upon successful extraction. You can view the status of resumes by using the Manage Resumes (HRS_AL_LOG) component. Values are:

Set to Draft: Select to set the status of successfully extracted resumes to Draft.

Set to Success: Select to set the status of successfully extracted resumes to Success.

On Extraction Failure Select the status that you want the system to assign to the resume upon a failed extraction. You can view the status of resumes by using the Manage Resumes component. Values are:

Reject Resume: Select to set the status of resumes that failed to extract to Rejected.

Set to Unresolved: Select to set the status of resumes that failed to extract to Unresolved.

Run Control ID Displays the run control ID. The system generates the run control ID after you click the Load Resumes button.

Process Monitor Click to access the Process List page, where you can monitor the process request.

Resume Source

Source and **SubSource** Select a source and subsource to assign to the resumes. The values that appear in the Source field are active recruitment sources with a source type of Marketing. After you select a source, the system populates the SubSource field with the subsources for that source. Define sources and subsources by using the Source Setup (HRS_SOURCE_SETUP) component.

Job Openings

Job Opening ID and **Posting Title** Select a job opening ID to link the applicants to the job opening. When you select a job opening, the system populates the Posting Title field automatically. If you specify more than one job opening, the system creates one application, but links the applicants to all job openings. When you link a job opening to an applicant, the disposition is set to Applied.

Resumes

Use this group box to view the resumes that you have uploaded.

Resumes Displays the file name for each resume that you have uploaded as a link. Click the file name link to open and view the resume in a separate browser window. To successfully open the file, you must have the application that the resume was created in installed on your computer.

Status Displays the status of each resume. Values are: *Awaiting Load, Draft, Success, Rejected,* and *Unresolved. Awaiting Load* appears for all resumes until the Resume Load Resume process completes. When the process completes the

system assigns a status to each resume based on the status values that you specify in the On Successful Extraction and On Extraction Failure fields.

Click a status link to access the Resume Management - Select Resume page, where you can view details for that resume. The statuses appear as links only after the process completes.

Additional Page Elements

Add Multiple Resumes Click to browse for a zip file and upload all resumes from that zip file. You must have network access to where the zip file is located. The system removes this button from the page after you initiate the Resume Load Process.

Add Resume Click to browse for and select a single file to upload. The system removes this button from the page after the process completes.

Load Resumes Click to run the Load Resume process. After you click this button, all options on this page become display-only.

View Log for All Resumes Click to access the Resume Management - Select Resume page, where you can view details for all resumes that were processed. This link appears only after the Load Resume process completes.

Managing Resumes

This section provides an overview of Resume Management, lists a prerequisite, and discusses how to:

- Manage resumes.
- View details for resumes.

Understanding Resume Management

Use the Manage Resumes (HRS_AL_LOG) component to view details for all resumes that the system receives via any channel. For each resume, you can view its source, channel, and status.

Prerequisite

Before you can manage resumes, the system must receive resumes from one of the valid channels.

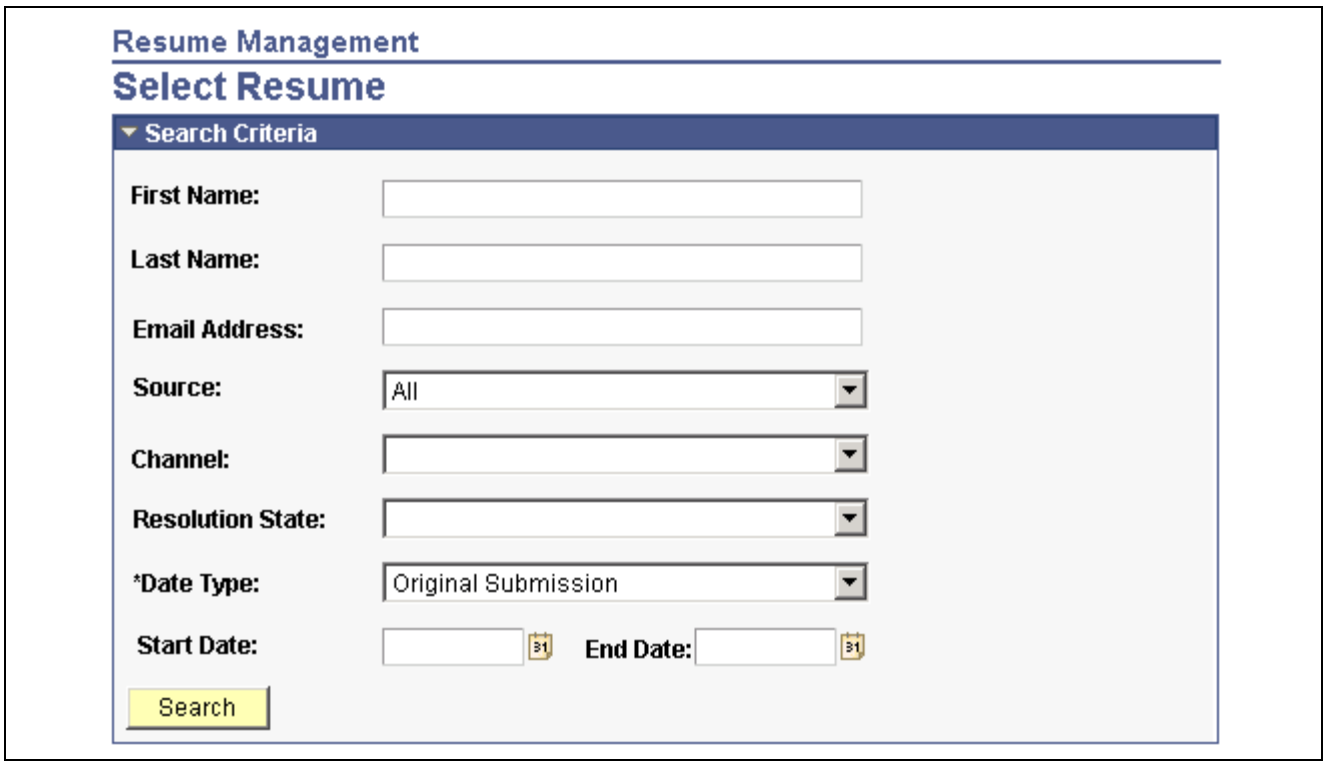
See Chapter 18, “Managing Resumes,” Understanding Resume Management, page 377.

Pages Used to Manage Resumes

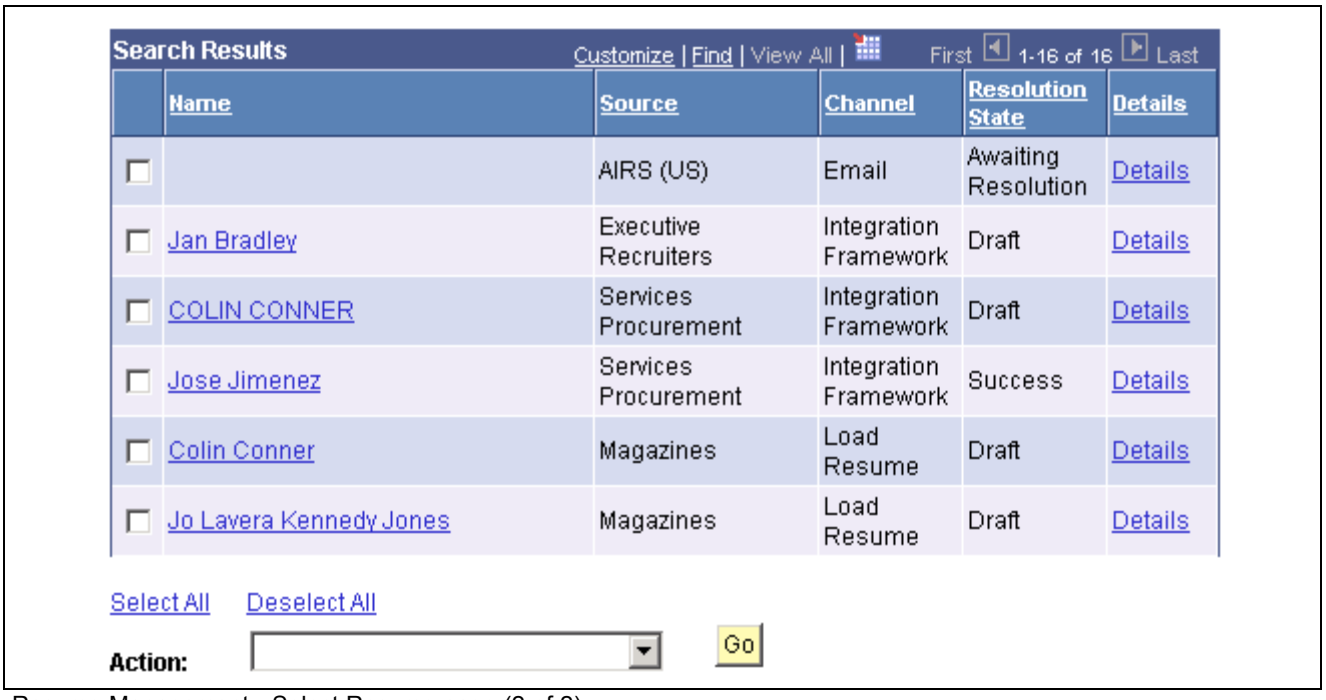
Page Name	Object Name	Navigation	Usage
Resume Management - Select Resume	HRS_AL_LOG	Recruiting, Administration, Manage Resumes, Resume Management - Select Resume	Manage resumes.
Resume Management Details	HRS_AL_LOG_DETAILS	Click the Details link for an applicant in the Search Results group box on the Resume Management - Select Resume page.	View details for resumes.
Open Integration Framework - Integration Log	HRS_HROI_LOG	Click the Integration Log link on the Resume Management Details page.	View transactions in the integration log for the applicant.
View Candidate XML	HRS_CANDIDATE_XML	Click the Candidate XML link on the Resume Management Details page.	View the final output of the resume extraction.

Managing Resumes

Access the Resume Management - Select Resume page.



Resume Management - Select Resume page (1 of 2)



Resume Management - Select Resume page (2 of 2)

Search Criteria

Use this group box to enter search criteria. Click Search to display the Search Results group box.

First Name and **Last Name** — Enter the partial or full first or last name of the applicant.

Email Address — Enter the email address of the applicant.

Source — Select a source. All sources that you set up by using the Source Setup component appear here.

Channel — Select a channel. Values are:

Apply Online: Displays resumes that applicants attach when they apply for job openings online by using Candidate Gateway

Email: Displays resumes that the system receives through an email account.

Integration Framework: Displays resumes that the system receives through the OIF.

Load Resume: Displays resumes that you uploaded through the Resume Load Process.

Manage Entry: Displays resumes that you attach to applicants that you manually enter into the system by using the Add New Applicant component.

Refer a Friend: This functionality is not available at this time.

Resolution State — Select a resume status. Values are: *Awaiting Resolution, Draft, Rejected, Success, Unresolved with Errors.*

Date Type, Start Date, and **End Date** — Select a date type and enter a start and end date to view resumes between those dates that meet the date type criteria. Values are:

Notifications: Select to search for resumes to which notifications have not been sent.

Original Submission: Select to search for resumes that have just come into the system.

Resolution Updates: Select to search for resumes that have been changed.

Search Results

Use this group box to view the resumes that meet the search criteria. For each resume the system displays the applicant's name, the source, channel, and resolution state (resume status).

Details Click to access the Resume Management Details page, where you can view details for the resume.

Additional Page Elements

Action and **Go** Select an action and click Go.. The system performs the action for all applicants that you select. For each action, the system logs a new row in the appropriate group box on the Resume Management Details page. Values are:

Reject: The system updates the status to Reject. Use this status for resumes that the resume extractor can't extract or work with.

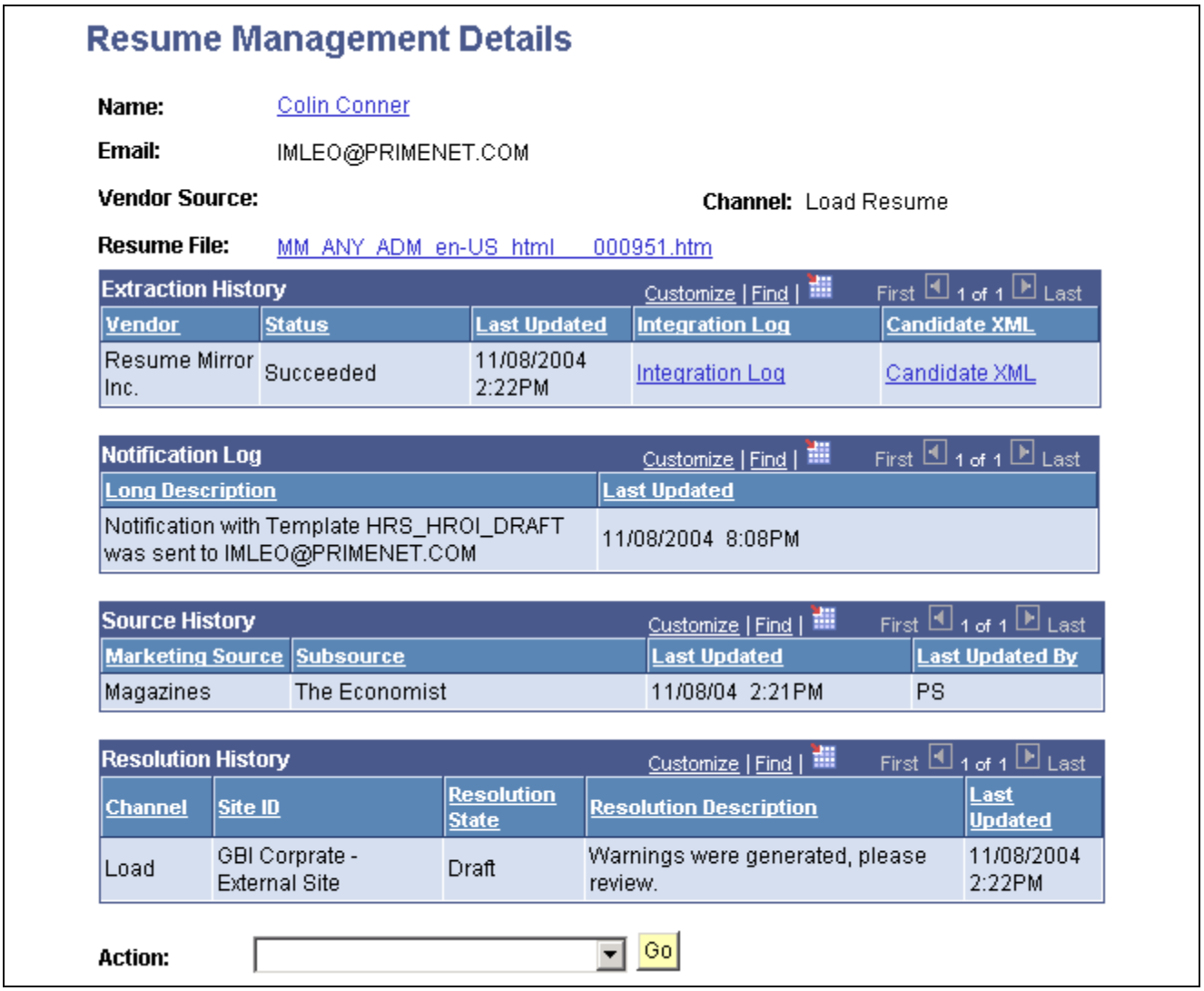
Reject & Notify: The system updates the status to Reject and sends a notification (HRS_HROI_REJECT) to all applicants. Use the message catalog to modify the message text.

Send Notifications: The system sends a notification (HRS_HROI_DRAFT, HRS_HROI_REJECT, HRS_HROI_SUCCESS, or HRS_HROI_UNRESOLVED) to the applicant. The notification that the system sends depends on the status of the resume. If the resume is from a specific source, the system looks at the setup in the Notifications group box on the Vendor page to determine which notification to send. Use the message catalog to modify the message text. When the system sends the notification, it also adds a row to the Notification Log group box on the Resume Management Details page that describes details about the notification.

View Applicants: Select to access the Manage Applicant page for the selected applicants.

Viewing Details for Resumes

Access the Resume Management Details page.



Resume Management Details page

Name Click the applicant's name link to access the Manage Applicant page for that applicant.

Source Displays the vendor recruitment source. The system populates this field only when a resume channel is email or OIF.

Resume File Click the resume file link to open and view the resume in a separate browser window. To successfully open the file, you must have the application that the resume was created in installed on your computer.

Extraction History

Use this group box to view resume extraction history details, included the resume extractor vendor, the status of the extraction, and the time in which the extraction took place. This group box appears on this page only if the resume has been extracted.

Integration Log Click to access the Open Integration Framework - Integration Log, where you can view all transactions for the extraction.

Candidate XML Click to access the View Candidate XML page, where you can view the final output of the resume extraction.

Notification Log

Use this group box to view the notifications that the system sends to the applicant. Each time you send a notification to the applicant, the system adds a new row that describes which template was used and to whom the notification was sent. This group box does not appear on the page unless the system has sent a notification to the applicant.

Source History

Use this grid to view details about the marketing recruitment sources and subsources that are associated to this resume.

Resolution History

Use this grid to view resolution history for the resume.

Additional Page Elements

Action and **Go** Select an action and click Go. Values are:

Edit Applicant: Select to access the Manage Applicant page, where you can view and modify the applicant's information.

Refresh: Select to refresh the page.

Send Notification: The system sends a notification (HRS_HROI_DRAFT, HRS_HROI_REJECT, HRS_HROI_SUCCESS, or HRS_HROI_UNRESOLVED) to the applicant. The notification that the system sends depends on the status of the resume. If the resume is from a specific source, the system looks at the setup in the Notifications group box on the Vendor page to determine which notification to send. Use the message catalog to modify the message text. When the system sends the notification, it also adds a row to the Notification Log group box that describes details about the notification.

CHAPTER 19

Managing Employee Referral Programs and Hot Jobs

This chapter discusses how to:

- Process eligibility and awards.
- View and override referral awards.
- Approve referral awards.
- Pay awards.
- Submit, confirm, and review referrals.
- Administer hot jobs.

See Also

Chapter 7, "Creating Employee Referral Programs," page 129

Processing Eligibility and Awards

This section provides overviews of the Employee Referral Program Application Engine process (HRS_ERP_MAIN) and payment statuses and discusses how to process eligibility and awards.

Understanding the Employee Referral Program Application Engine Process (HRS_ERP_MAIN)

When you set up employee referral programs, you capture time-sensitive rules that dictate eligibility and awards for each referral under the particular employee referral program. The Employee Referral Program process applies these time-sensitive rules at the appropriate times in a referral's life span.

It is necessary to establish which employee referral program a referral is associated with before determining eligibility and awards. This association occurs only when an applicant is hired into a job opening that has an employee referral program associated. Therefore, you cannot determine eligibility and awards before an applicant is hired.

You can run the Employee Referral Program process for a specific employee referral program or for all employee referral programs. The Employee Referral Program process determines eligibility, creates awards, and processes award payments through PeopleSoft Enterprise Payroll for North America, depending on the options that you select on the run control page. If you select the Eligibility and Awards Rules option on the Process Referral Programs - Employee Referral Programs page, the system determines whether the referring employee is eligible for employee referral program awards and determines the amount and timing of awards. If you select the Interface to Payroll for NA option, the system processes award payments through Payroll for North America.

See Chapter 19, "Managing Employee Referral Programs and Hot Jobs," Paying Awards, page 410.

Eligibility Processing

The Employee Referral Program process checks employee eligibility according to the rules and criteria set up in the employee referral program for the following three dates:

- Referral date.
- Hire date.
- Award date.

You associate rules with these dates by using the When to Apply field on the Employee Referral Program - Rules page in the Employee Referral Program (HRS_REF_PGM) component. Criteria apply at various times depending on the particular criteria or on how you set up the program. This table shows the dates for which the rules and criteria are processed:

Rule or Criterion	Referral Date	Hire Date	Award Date
Employee eligibility rules	Determined by the value in the When to Apply field on the Employee Referral Program - Rules page.	Determined by the value in the When to Apply field on the Employee Referral Program - Rules page.	Determined by the value in the When to Apply field on the Employee Referral Program - Rules page.
Award category rules	NA	Applies	NA
Referral life span criteria	NA	Applies (checks the referral life span value in the Limit Referral Life Span To field on the Employee Referral Program - Criteria page against the time elapsed between the referral and hire dates).	NA
Employee is a direct or indirect manager of the hired applicant	NA	Applies if the Disqualify if applicant reports to the referring employee option is selected on the Employee Referral Program - Criteria page.	NA

Rule or Criterion	Referral Date	Hire Date	Award Date
Manager level criteria	NA	Applies (checks the value in the Disqualify employee if their Manager Level is greater than or equal to field on the Employee Referral Program - Criteria page).	NA
Previous employee criteria	May apply, depending on whether the Allow Previous Employees option is selected and on the value in the prior to the field on the Employee Referral Program - Criteria page.	May apply, depending on whether the Allow Previous Employees, option is selected and on the value in the prior to the field on the Employee Referral Program - Criteria page.	NA
Family member referral criteria	NA	Applies if the Allow Family Member Referrals option is selected on the Employee Referral Program - Criteria page.	NA
Applicant must be actively employed	NA	Applies	Applies

When Eligibility is Not Recalculated

The Employee Referral Program process does not recalculate eligibility for every referral in an employee referral program every time that it runs. It does not process or reprocess eligibility under the following conditions:

- The applicant has not been hired.
- The referral has been processed and marked ineligible.
- The referral was processed and marked eligible as of the hire date, but the award date has not been reached when the process runs again.
- The eligibility status has been overridden and not marked as a reprocess.

Reprocessing Eligibility for Duplicate Applicants

Duplicate applicant records can result in erroneous employee referral program eligibility results after the applicant data is merged. Before the duplicate applicant records are merged, there can be multiple distinct applicant records and multiple distinct referral records all for the same applicant. After merging, there is only one applicant record, but the system maintains multiple referral records. You must run the Employee Referral Program process again to make sure the eligibility status is correct because the original results were based on an unmerged data set. You can override eligibility on the Administer Referrals (HRS_REF_ADMN) component and rerun the Employee Referral Program process, if necessary.

You can distribute the referral award among multiple eligible employees on the Review Duplicate Referrals page.

Awards Processing

After checking eligibility, the Employee Referral Program process begins award processing if the referral meets both of the following conditions for a particular employee referral program:

- Applicant is hired.
- Employee is eligible as of the referral date (if any rules apply) and as of the applicant's hire date.

During award processing, the system:

1. Checks the job opening that the applicant was hired into against the employee referral program's award category rules.
    a. If the job opening *is not* in any of the award categories, the process sets the eligibility status to Ineligible and issues a message that the job opening is not covered by the employee referral program.
    b. If the job opening *is* in an award category, the process schedules awards.

       The first award category rule that the job opening satisfies determines the award schedule.

       For example, if you define an award category rule for IT jobs and another for Executive Level jobs, what rule would the an IT Executive level job be associated to? The answer is, the first one they system finds in the list of award categories.
2. Checks hot jobs.

   If the job opening is a hot job, the hot job award schedule overrides the award schedule of the employee referral program award category rule.

Understanding Payment Statuses

This table describes payment status values that you might see in the Payment Status field when viewing employee referral program award data. Unless otherwise specified, *payroll* refers to PeopleSoft Enterprise Payroll for North America only:

Payment Status	Description	Process that Writes Status
Approved - Goes to Payroll (AP)	Approved award that has not yet been submitted for payment.	• Entered by the Employee Referral Program process if you select Eligibility and Awards Rules on the Process Referral Programs - Employee Referral Programs page and clear the Require Approval for Payment option on the Employee Referral Program - Employee Referral Programs page. • Entered manually on the Referral Award Details page if you select the Require Approval for Payment option on the Employee Referral Program - Employee Referral Programs page or after correcting rejected awards.
Needs Approval (NA)	The employee referral program requires approval of awards and this award has not yet been approved.	• Entered by the Employee Referral Program process if you select the Eligibility and Awards Rules option on the Process Referral Programs - Employee Referral Programs page and select the Require Approval for Payment on the Employee Referral Program - Employee Referral Programs page. • Entered manually on the Referral Award Details page if a nonapprover corrects rejected awards.
Cancelled (CN)	Plan administrator cancels an award.	Entered manually on the Referral Award Details page.
Sent to Payroll (SP)	Awards have been published to Payroll for North America.	Entered by the Employee Referral Program process if you select Interface to Payroll for NA (interface to Payroll for North America) on the Process Referral Programs - Employee Referral Programs page.
Taken by Payroll (TP)	Payroll confirms receipt of award.	Entered by the Employee Referral Program process if you select Interface to Payroll for NA on the Process Referral Programs - Employee Referral Programs page.

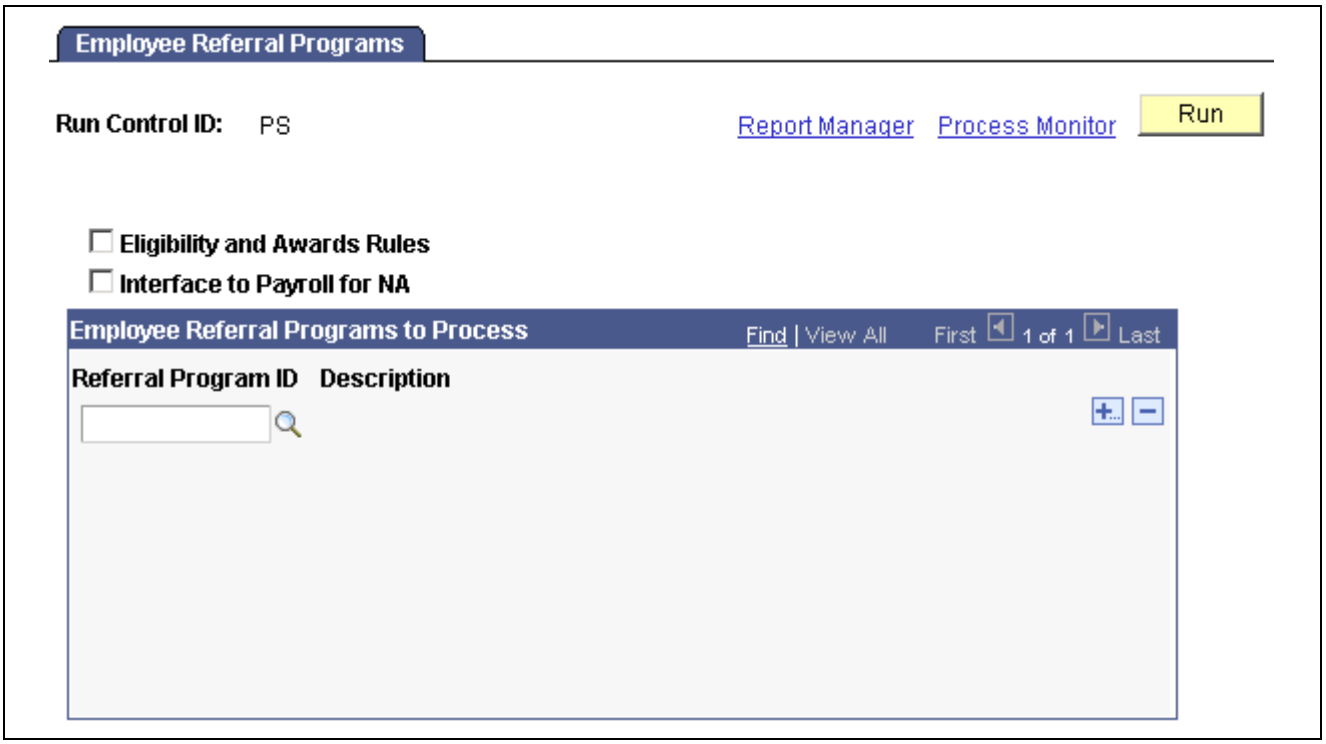
Payment Status	Description	Process that Writes Status
Paid (PD)	Payroll has paid award.	Entered by the Employee Referral Program process if you select Interface to Payroll for NA on the Process Referral Programs - Employee Referral Programs page.
Rejected by Payroll (RP)	Payroll rejects award payment. This is typically due to erroneous data.	Entered by the Employee Referral Program process if you select Interface to Payroll for NA on the Process Referral Programs - Employee Referral Programs page.
Reversed by Payroll (RV)	Payroll reverses award payment. This is typically due to an employee being incorrectly paid.	Entered by the Employee Referral Program process if you select Interface to Payroll for NA on the Process Referral Programs - Employee Referral Programs page.

Page Used to Process Eligibility and Awards

Page Name	Object Name	Navigation	Usage
Process Referral Programs - Employee Referral Programs	HRS_ERP_RUN	Recruiting, Employee Referrals, Process Referral Programs, Employee Referral Programs	Process eligibility and awards and submit awards to Payroll for North America.

Processing Eligibility and Awards

Access the Process Referral Programs - Employee Referral Programs page.



Process Referral Programs - Employee Referral Programs page

Click Run to run this request. PeopleSoft Process Scheduler runs the Employee Referral Program process at user-defined intervals.

Eligibility and Awards Rules Select to process eligibility and create awards.

Interface to Payroll for NA (interface to Payroll for North America) Select to process award payments through Payroll for North America.

Referral Program ID Select the employee referral programs that you want to process. You can add rows as necessary. If you do not select an employee referral program, the process runs for all employee referral programs.

See Also

PeopleTools 8.45 PeopleBook: Using PeopleSoft Applications

Viewing and Overriding Referral Awards

This section provides an overview of referral overrides, lists common elements, and discusses how to:

- View referral summary information.
- View and override employee eligibility.
- View awards.
- Override award details.

- View eligibility by application.
- View and override duplicate referrals.

Understanding Referral Overrides

To manage referral overrides:

- View and override eligibility and award information for referrals by using the Administer Referrals component.
- View duplicate referrals and adjust award amounts among eligible employees by using the Review Duplicate Referrals page.
- View an audit list of manual overrides, including who made the change, when the change was made, and details of the change, by using the Review Override Audit (HRS_OVERRIDE_AUDIT) component.

Common Elements Used in This Section

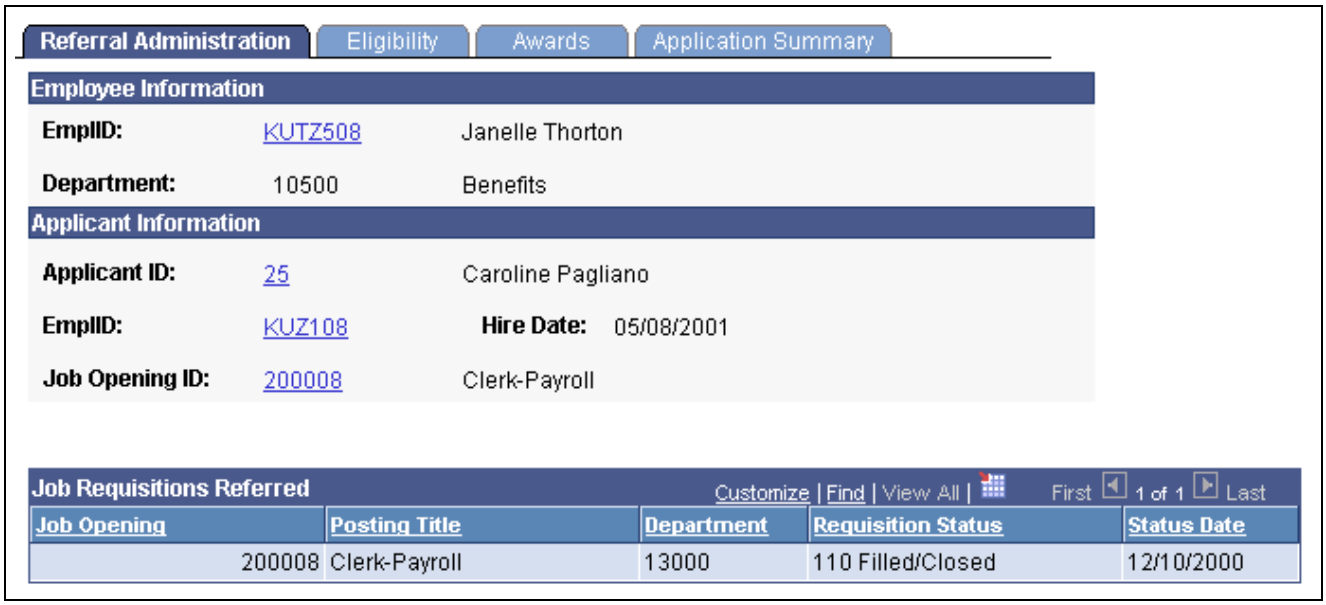
Applicant ID	Click to view the applicant's resume.
EmplID	Click to view job data for the applicant or employee.
Job Opening ID	Click to access the Job Opening page, where you can view information for the job opening.

Pages Used to View and Override Referral Awards

Page Name	Object Name	Navigation	Usage
Referral Administration	HRS_REF_ADMN_MAIN	Recruiting, Employee Referrals, Administer Referrals, Referral Administration	View referral summary information.
Administer Referrals - Eligibility	HRS_REF_ADMN_ELIG	Recruiting, Employee Referrals, Administer Referrals, Eligibility	View and override employee eligibility.
Administer Referrals - Awards	HRS_REF_ADMN_AWD	Recruiting, Employee Referrals, Administer Referrals, Awards	View awards.
Referral Award Details	HRS_EE_REF_AWD_OVR	• Click the Details link on the Administer Referrals - Awards page. • Click the Details link on the Referral Award Approval page. This page is display-only. • Click the Edit link on the Rejected Awards page.	Override award details. **Note.** When you access the Referral Award Details page from the Referral Award Approval page, the Referral Award Details page is display-only.
Application Summary	HRS_REF_ADMN_APPDT	Recruiting, Employee Referrals, Administer Referrals, Application Summary	View eligibility by application.
Review Duplicate Referrals	HRS_DUP_REF	Recruiting, Employee Referrals, Track Duplicate Referrals, Review Duplicate Referrals	View and override duplicate referrals.
Eligibility Overrides	HRS_AUDIT_OVR_ELIG	Recruiting, Employee Referrals, Review Override Audit, Eligibility Overrides	View the audit details of manual overrides to eligibility data. You can select overrides by applicant, by employee, or by the administrator who overrode the audited field. Only referrals that contain audit information are available in the search.
Award Overrides	HRS_AUDIT_OVR_AWD	Recruiting, Employee Referrals, Review Override Audit, Award Overrides	View the audit details of manual overrides to award data.

Viewing Referral Summary Information

Access the Referral Administration page.



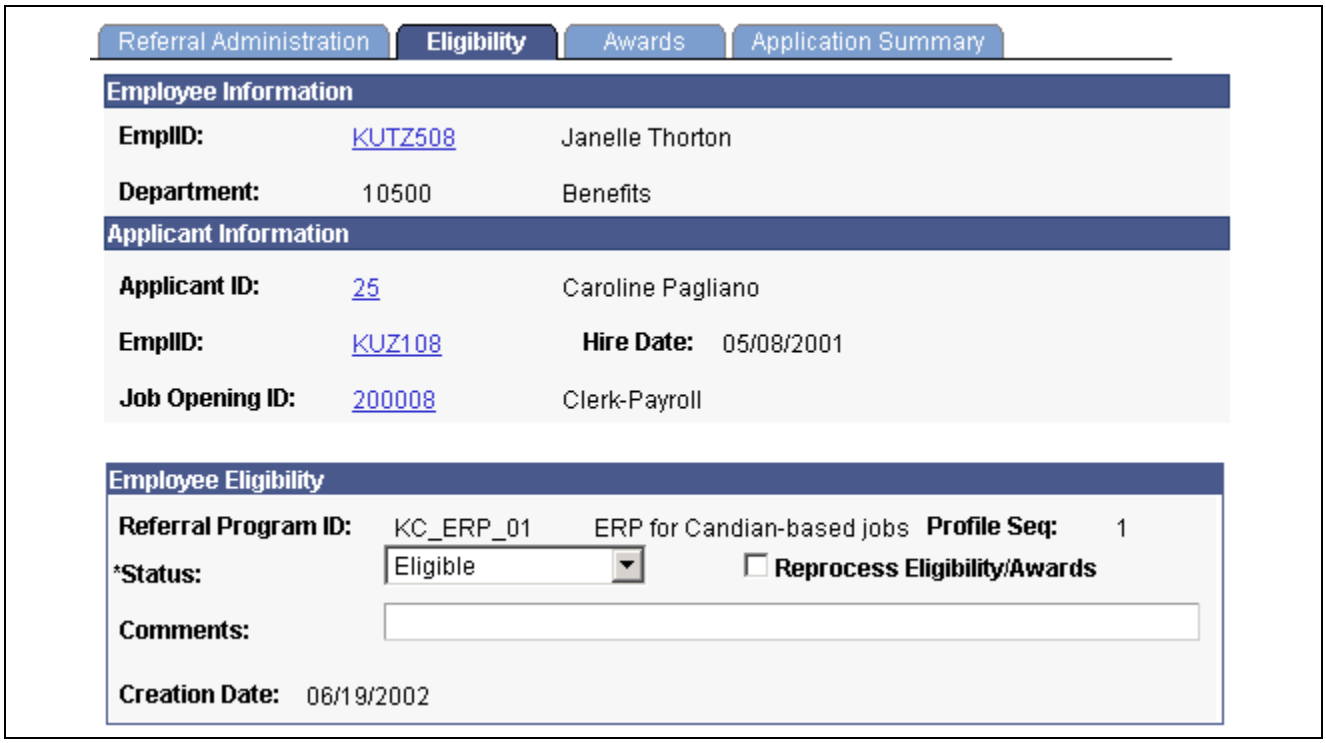
Referral Administration page

Job Requisitions Referred

Use this group box to view information for all job openings to which the employee has referred the applicant.

Viewing and Overriding Employee Eligibility

Access the Administer Referrals - Eligibility page.



Administer Referrals - Eligibility page

Employee Eligibility

Use this group box to view eligibility data for each eligibility rule that is defined in the Employee Eligibility Rules group box on the Employee Referral Program - Rules page.

If the applicant has not been hired, the system issues the following message: "Eligibility has not yet been determined" in place of the fields in the Employee Eligibility group box.

Status Displays the current employee eligibility status. Values are *Eligible* and *Ineligible.* You can override the *Eligible* status only if the award has not been submitted for payment. If you manually change the status from *Ineligible* to *Eligible,* the system does not reprocess eligibility rules that are evaluated as of the referral date or hire date.

Reprocess Eligibility/Awards Select to rerun all eligibility and awards processing the next time that you run the Employee Referral Program process. This option is unavailable if any of the awards for the referral have been sent to the payroll system.

Comments Displays a comment that explains the reason for the eligibility status. You can manually enter a comment that supersedes the system-generated comment.

If you manually change the eligibility status, the system enters this comment: "Manual override by administrator." You can view details of a manual override on the Eligibility Overrides page.

Creation Date Displays the date that the eligibility status was originally determined by the system.

Event Type Displays the category of the rule or criteria that causes the ineligibility status. This field appears on the page only when the eligibility status is Ineligible. Values are:

Award Eligibility Rule: Eligibility rule associated with the award date in the When to Apply field on the Employee Referral Program - Rules page.

General Eligibility Criteria: Any of the criteria defined on the Employee Referral Program - Criteria page.

Hire Eligibility Rule: Eligibility rule associated with the applicant's hire date in the When to Apply field on the Employee Referral Program - Rules page.

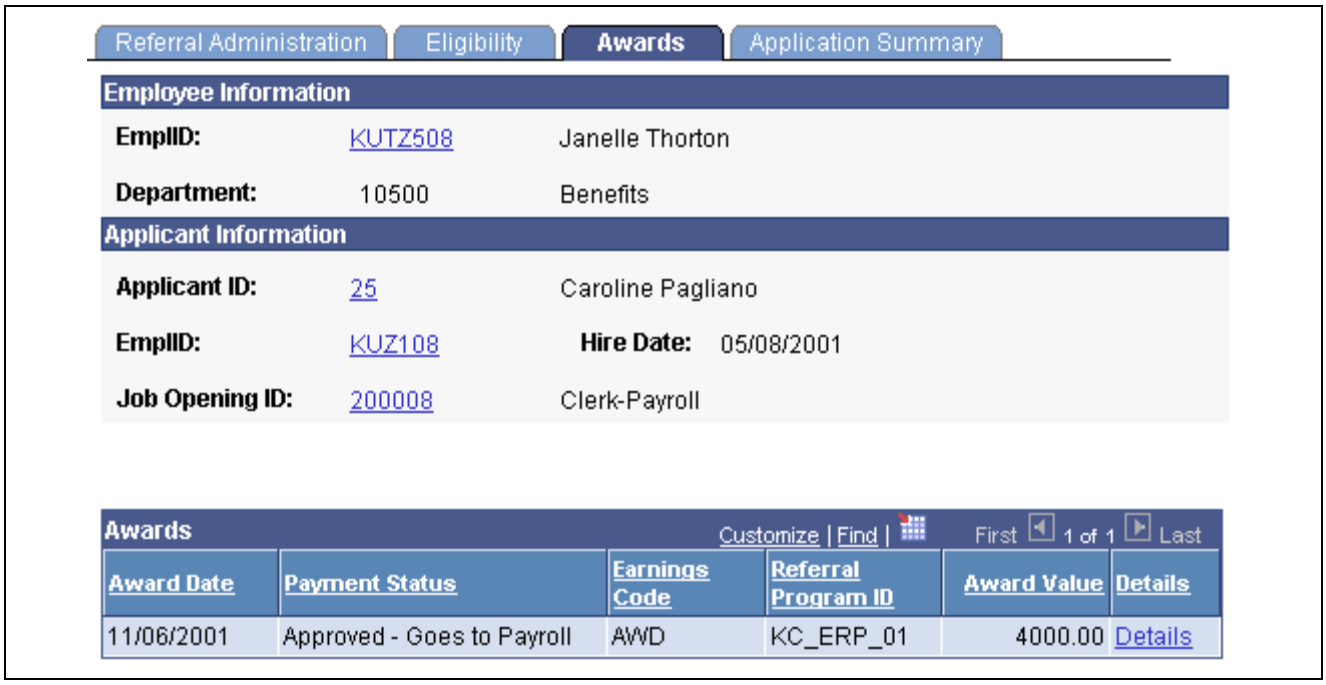
Manual Override: Manual change on this page.

Referral Eligibility Rule: Eligibility rule associated with the referral date in the When to Apply field on the Employee Referral Program - Rules page.

Event Date Displays the date that the eligibility status was last changed. This field appears on the page only when the eligibility status is Ineligible.

Viewing Awards

Access the Administer Referrals - Awards page.



Administer Referrals - Awards page

Award Date Displays the award date. The system calculates this date according to the duration in the award schedule.

Payment Status Displays the payment status.

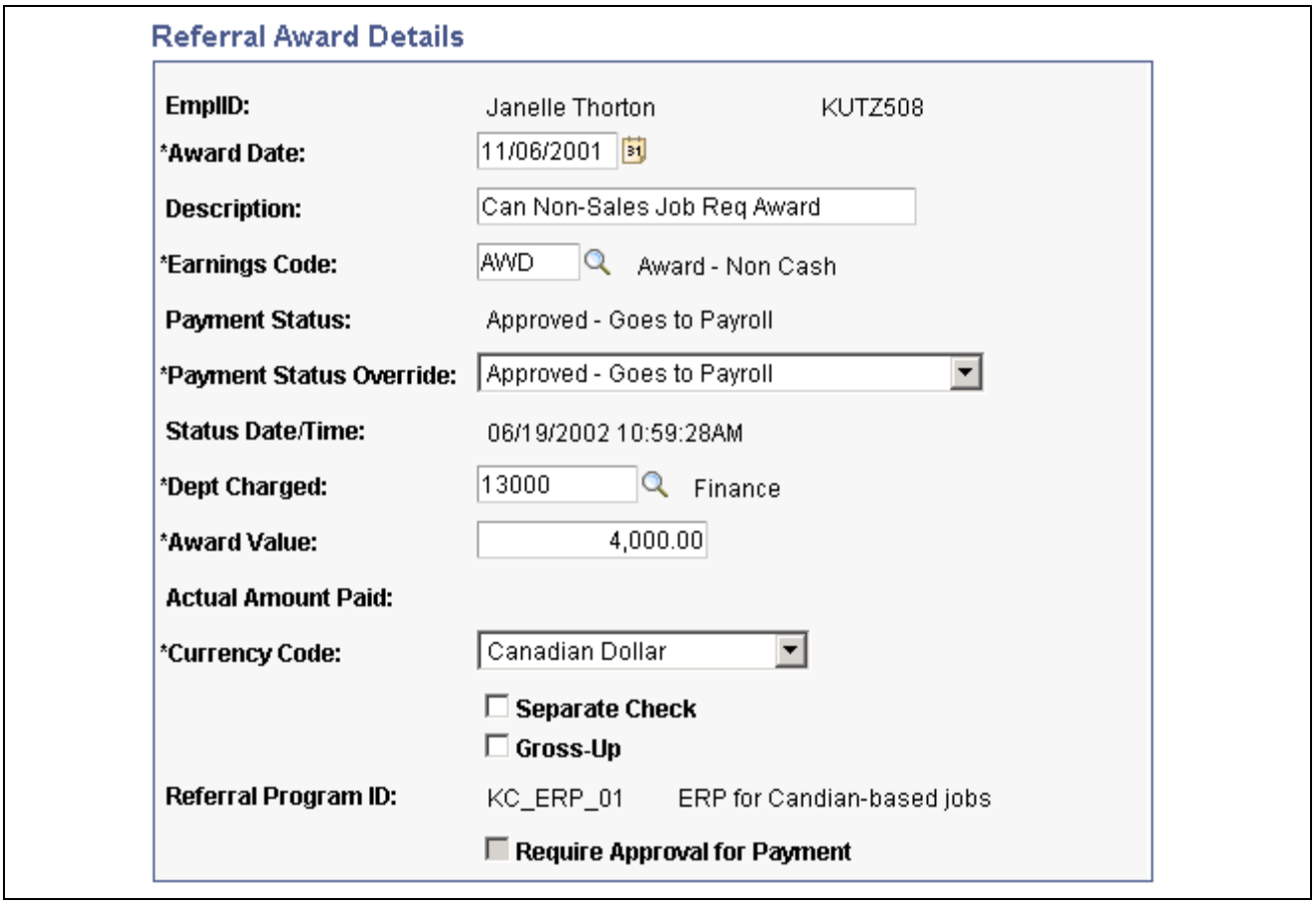
See Chapter 19, "Managing Employee Referral Programs and Hot Jobs," Understanding Payment Statuses, page 396.

Award Value Displays the award value. The system determines this value based on the award schedule of the award category.

Details Click to access the Referral Award Details page, where you can override award details.

Overriding Award Details

Access the Referral Award Details page.



Referral Award Details page

Much of the data on this page reflects the rules and criteria that are set up for the employee referral program. You can override the value in any editable field.

Award Date Displays the award date. The system calculates this date according to the duration in the award schedule.

Description Displays the description that you specified for the award on the Award Schedule page.

Payment Status Override Select a payment status. Use this field to manually approve an award that has *Needs Approval* status. You can do this only if the eligibility status is *Eligible.*

The employee referral program administrator can manually change the payment status to or from *Needs Approval, Approved,* or *Cancelled.*

You cannot manually override the status of an award that is submitted to be paid, unless Payroll for North America has rejected it.

If an award has been rejected by Payroll for North America, the employee referral program administrator can change a *Rejected by Payroll* or *Reversed by Payroll* status to:

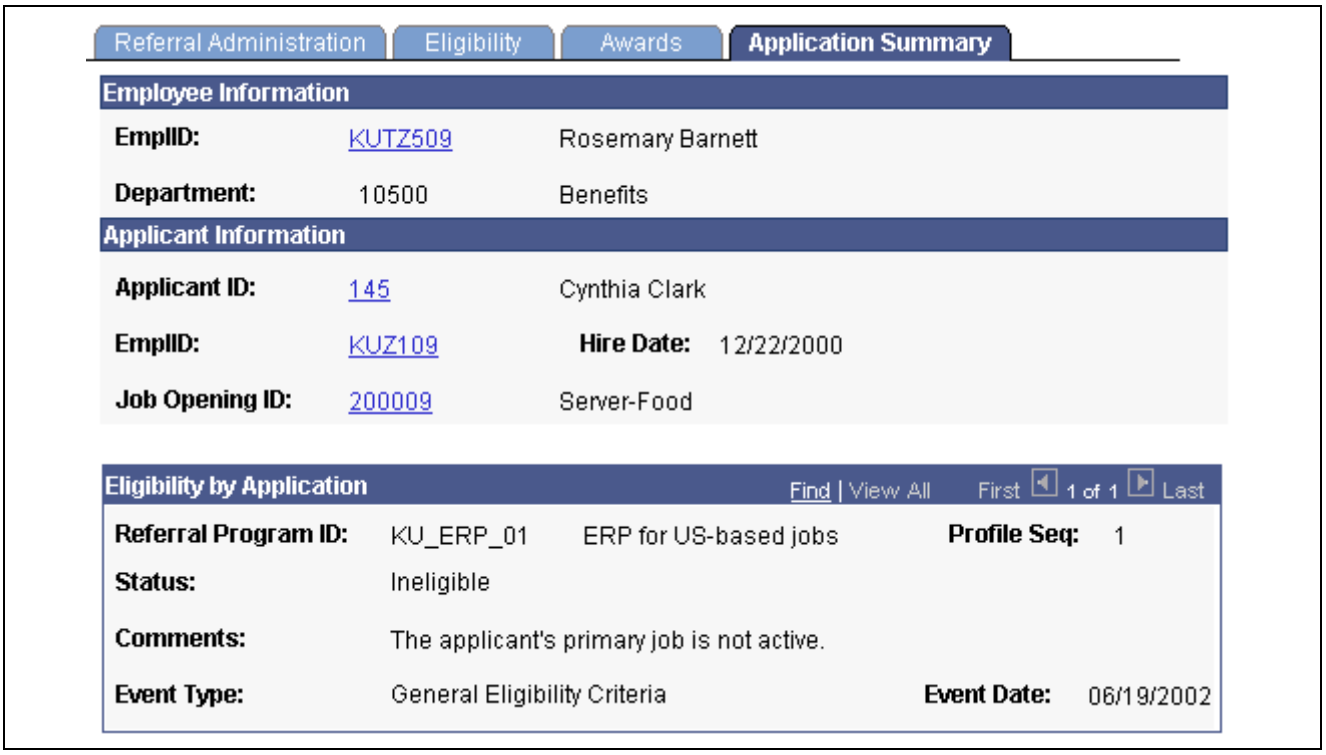
Cancelled: You accept the reason for the rejection and do not intend to correct it.

Needs approval: You corrected the reason for the rejection and now the award is ready to be approved again.

	Approved: You corrected the reason for the rejection and now the award is ready to be submitted when the process runs again for the employee referral program.
Dept Charged (department charged)	Displays the department (of the job opening) into which the applicant was hired.
Award Value	Displays the amount of the award as defined in the award schedule.
Actual Amount Paid	Displays the value that is entered when the award is paid through Payroll for North America.
Currency Code	Displays the currency in which the award is paid to the employee.
Separate Check	Select to override the default that you set up on the Employee Referral Program - Employee Referral Programs page.
Gross-Up	Select to override the default that you set up on the Award Schedule page. If you select this option and use Payroll for North America, the award is paid by a separate check.
Require Approval for Payment	Set the value for this field on the Employee Referral Program - Employee Referral Programs page. You cannot change it here.
Rejected Reason	Displays the reason that Payroll for North America rejected the award. This field only appears when the award is rejected by the payroll system.
Last Manual Override	Displays the date of the last manual override. You can view details of the override on the Award Overrides page. This field only appears when an administrator manually changes an award payment-related field.

Viewing Eligibility by Application

Access the Application Summary page.



Application Summary page

This page shows all the dates on which the employee referred the applicant and the employee's eligibility status for each referral. Remember that eligibility for award payment is determined by the job opening into which the applicant is hired.

Comments Displays the reason if the eligibility status is Ineligible.

Viewing and Overriding Duplicate Referrals

Access the Review Duplicate Referrals page.



Review Duplicate Referrals page

Employees appear on this page in the order in which they referred the applicant. The first employee that appears is the first employee who referred the applicant, and so on.

The total award for all employees can be more than the original award if you selected Allow Dups to Exceed Original (allow duplicates to exceed original) on the Employee Referral Program - Criteria page when you set up the employee referral program.

Original Award Total Displays the total value of all awards in the original award schedule.

Current Award Total Displays the total of all awards entered on the page for all the referring employees.

Award Total Displays the total value of all awards for the employee.

Referral Time Stamp Displays the exact time that the employee submitted the referral.

Award Value	Adjust the award amount for each employee.
Ineligible for referral award	Select to prevent the employee from receiving referral awards. This option is not available for the first employee who submitted the referral.
Refresh	Click to refresh the award total amounts in the Current Award Total and Award Total fields.

Approving Referral Awards

This section provides an overview of award approvals and discusses how to approve referral awards.

Understanding Award Approvals

When you set up the employee referral program, define whether awards require approval before payment. If approval is required, the system assigns the awards the Needs Approval payment status when you run the Employee Referral Program process. You must manually approve the awards.

To manually approve awards, you can:

- Use the Referral Award Approval page to approve all awards or selected awards in the employee referral program when the payment status is Needs Approval.
- Use the Rejected Awards page to correct and approve awards when the payment status is Rejected by Payroll.

  See Chapter 19, "Managing Employee Referral Programs and Hot Jobs," Viewing Rejected Awards, page 413.
- Use the Referral Award Details page in the Administer Referrals component to override award details and approve the award when the payment status is other than Needs Approval or Rejected by Payroll.

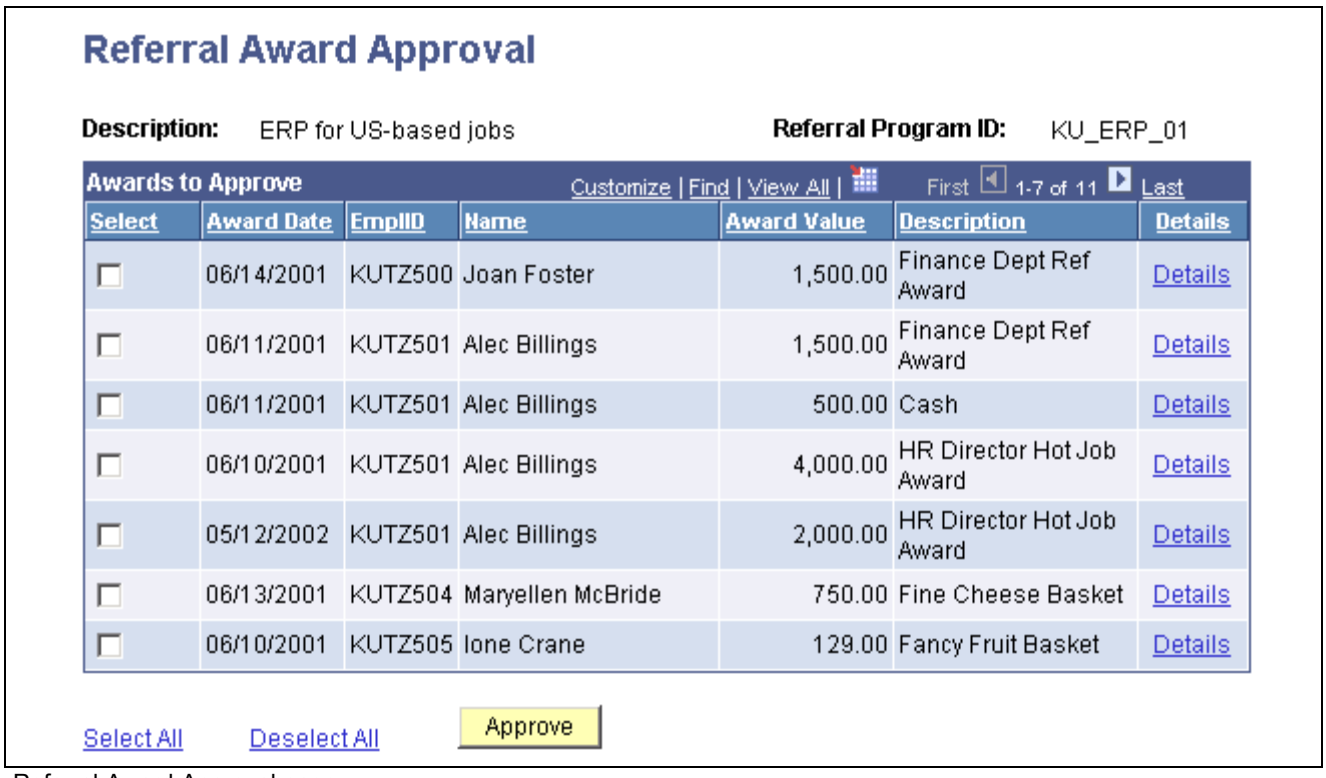
  See Chapter 19, "Managing Employee Referral Programs and Hot Jobs," Overriding Award Details, page 404.

Pages Used to Approve Referral Awards

Page Name	Object Name	Navigation	Usage
Referral Award Approval	HRS_MASS_APRV	Recruiting, Employee Referrals, Approve Employee Referrals, Referral Award Approval	Approve referral awards that have the status of Needs Approval.
Referral Award Details	HRS_EE_REF_AWD_OVR	• Click the Details link on the Administer Referrals - Awards page. • Click the Details link on the Referral Award Approval page. This page is display-only. • Click the Edit link on the Rejected Awards page.	Override award details. **Note.** When you access the Referral Award Details page from the Referral Award Approval page, the Referral Award Details page is display-only.

Approving Referral Awards

Access the Referral Award Approval page.



Referral Award Approval

Description: ERP for US-based jobs **Referral Program ID:** KU_ERP_01

Awards to Approve Customize | Find | View All | First 1-7 of 11 Last

Select	Award Date	EmplID	Name	Award Value	Description	Details
☐	06/14/2001	KUTZ500	Joan Foster	1,500.00	Finance Dept Ref Award	Details
☐	06/11/2001	KUTZ501	Alec Billings	1,500.00	Finance Dept Ref Award	Details
☐	06/11/2001	KUTZ501	Alec Billings	500.00	Cash	Details
☐	06/10/2001	KUTZ501	Alec Billings	4,000.00	HR Director Hot Job Award	Details
☐	05/12/2002	KUTZ501	Alec Billings	2,000.00	HR Director Hot Job Award	Details
☐	06/13/2001	KUTZ504	Maryellen McBride	750.00	Fine Cheese Basket	Details
☐	06/10/2001	KUTZ505	Ione Crane	129.00	Fancy Fruit Basket	Details

Select All Deselect All Approve

Referral Award Approval page

All awards that have the Needs Approval payment status appear on this page.

Select Select the referral awards that you want to approve.

Details Click to access the Referral Award Details page, where you can view referral award details.

Select All Click to select all referral awards in the list, including those outside the view area.

Approve Click to approve the selected referral awards. After awards are approved, they do not appear on this page again.

Paying Awards

This section provides an overview of the integration with Payroll for North America and discusses how to:

- Submit awards.
- View rejected awards.
- Edit rejected awards.

Understanding the Integration with Payroll for North America

The interface between employee referral programs and payroll processing depends upon the payroll system that you use to pay the referring employee. If you pay employees through Payroll for North America, use the Employee Referral Program process to publish the monetary and non-stock, non-monetary awards directly to Payroll for North America using PeopleSoft application messaging. If you pay employees through a payroll system other than Payroll for North America, you must create an interface to that payroll system.

Access the Process Referral Programs - Employee Referral Programs page and select the Interface to Payroll for NA option to run the Employee Referral Program process. The same process is used to determine eligibility and create awards.

The Employee Referral Program process:

- Submits awards for payment.

  The process sends approved awards to payroll that have been scheduled with an award date prior to or equal to the current date. The process does not submit awards that have already been submitted or awards that are future-dated.

- Updates the payment status for each submitted award to Sent to Payroll.
- Retrieves paid award information from Payroll for North America.

  After payroll pays an award and publishes the results, the subscription process retrieves payment information and updates these records:

  - Employee referral program data records (HRS_EE_REF_AWD).
  - Job opening expense data (HRS_JO_EXP).

    The job opening expense amount is the amount that is paid by payroll, including taxes that have been grossed up. You can view the expense information on the Job Opening - Activity & Attachments and Add Expenses pages. The expense code value is *Referral Fee.*

The payroll system:

- Calculates gross-up amounts and taxes.
- Pays the cash awards.
- Posts the amounts to the appropriate general ledger account.

If the currency code of the award does not match the currency code of the employee's pay group, the award is rejected and the employee referral program administrator must use the Rejected Awards page to override the values.

If the converted amount of the award is greater than 8.2 digits, the award is rejected and the employee referral program administrator must use the Rejected Awards page to split the award into two payments.

Integration with Payroll for North America Process Flow

This table outlines the award payout integration between employee referral programs and Payroll for North America:

Integration Step	Description
Employee referral program publishes a payment request for approved awards to payroll.	Publishes the award amount in the currency of the award category. Sets the award's payment status to Sent to Payroll.
Payroll subscribes to the payment request, which automatically runs a PeopleSoft Application Engine process to validate or reject the award data and publishes an acknowledgement of acceptance or rejection.	Subscription inserts the awards into a subscribing staging table. Validation checks for error conditions that require correction prior to loading to paysheet. If award data is valid, the system inserts the awards into the application table and publishes an acknowledgement that sets the award's payment status to Taken by Payroll. If errors are detected, the system publishes an acknowledgment that sets the award's payment status to Rejected by Payroll and supplies a reason code.
Employee referral program subscribes to the acknowledgement of rejected awards or awards with errors.	Employee referral program administrator uses the Rejected Awards page to view the reason for rejection and the Referral Award Details page to correct the award data.
Payroll processes validated awards and issues checks.	Payroll creates paysheets, calculates gross-up amounts and taxes, confirms pay, issues checks, and posts amounts to the general ledger.
Payroll runs a PeopleSoft Application Engine process to publish a notification of payment.	This process runs after payments are calculated and confirmed.
Employee referral program subscribes to the notification of payment.	The subscription updates the award's payment status to Paid or Reversed by Payroll and updates the status date and time, actual amount paid, paycheck status, paycheck number, and check date.

Enterprise Integration Points

This table describes the application messages that are used to transfer awards and payout data between Recruiting Solutions and Payroll for North America:

EIP Name	Message Name	Message Definition
ERECRUIT REQUEST FOR PAYMENT	PAYMENT_ERECRUIT_ REQUEST	Recruiting Solutions publishes award data to payroll and payroll subscribes to the award data.

EIP Name	Message Name	Message Definition
ACKNOWLEDGMENT /VERIFICATION OF ERECRUIT PAYMENT	PAYMENT_ERECRUIT_ ACKNOWLEDGE	Payroll validates the requested awards and publishes the results of validation. Recruiting Solutions subscribes to the acknowledgement.
PAYROLL ISSUED ERECRUIT PAYMENT	PAYMENT_ERECRUIT_ISSUED	Payroll publishes notification of payment and Recruiting Solutions subscribes to the notification.

See Also

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Integration Broker

Pages Used to Pay Awards

Page Name	Object Name	Navigation	Usage
Process Referral Programs - Employee Referral Programs	HRS_ERP_RUN	Recruiting, Employee Referrals, Process Referral Programs, Employee Referral Programs	Submit awards to Payroll for North America and process eligibility and awards.
Rejected Awards	HRS_REJECTED_AWDS	Recruiting, Employee Referrals, Review Rejected Awards, Rejected Awards	View rejected awards.
Referral Award Details	HRS_EE_REF_AWD_OVR	• Click the Details link on the Administer Referrals - Awards page. • Click the Details link on the Referral Award Approval page. This page is display-only. • Click the Edit link on the Rejected Awards page.	Override award details. **Note.** When you access the Referral Award Details page from the Referral Award Approval page, the Referral Award Details page is display-only.

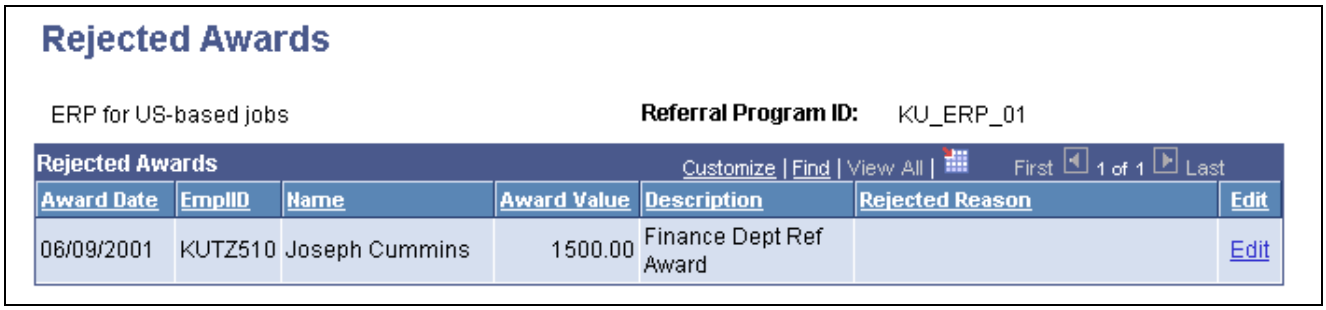
Submitting Awards

Access the Process Referral Programs - Employee Referral Programs page.

See Chapter 19, "Managing Employee Referral Programs and Hot Jobs," Processing Eligibility and Awards, page 398.

Viewing Rejected Awards

Access the Rejected Awards page.



Rejected Awards page

Rejected Reason Displays the reason that Payroll for North America rejected the award. Use this to determine which data to correct. Values are:

Amount Exceeds Payroll Maximum

Expenses Sheet in Error

Invalid Currency Code

Invalid Earning Code

Invalid Employee ID & Record # (invalid employee ID and record number)

Problem in loading to file

Reject All - Requested by User

Transaction Already Exists

Edit Click to access the Referral Award Details page, where you can correct the error that caused rejection.

Editing Rejected Awards

Access the Referral Award Details page.

Note. You can also override or reprocess eligibility for a rejected award on the Administer Referrals - Eligibility page.

See Also

Chapter 19, "Managing Employee Referral Programs and Hot Jobs," Overriding Award Details, page 404

Chapter 19, "Managing Employee Referral Programs and Hot Jobs," Viewing and Overriding Employee Eligibility, page 402

Submitting, Confirming, and Reviewing Referrals

This section provides an overview of employee and applicant referrals and lists the pages used to submit, confirm, and review referrals.

Understanding Employee and Applicant Referrals

The two referral methods are:

- Employee referrals.

  Employees refer applicants through employee self-service and can review the eligibility and payment status of the referrals that they submit.

- Applicant referrals.

  There are two ways to submit applicant referrals:

  - External applicants can submit referral information when they apply for jobs online.
  - Recruiters can enter an employee as the referral source for an applicant when they manually add an applicant.

Employee Referrals

To refer an applicant, an employee:

1. Clicks the Refer Friend button on the Careers Home, Job Search, or My Saved Jobs page.

   An employee can also refer an applicant for a specific job opening by selecting a job on the Careers Home, Job Search, or My Saved Jobs page before clicking the Refer Friend button, or by clicking the Refer Friend button on the Job Description page.

2. Selects a resume option and clicks Continue on the Refer Friend - Choose Resume page.

   The three resume options are:

   - Copy and paste resume text.

     If employees select this option, the Refer Friend - Enter Resume Text page appears. Employees enter a name for the resume in the Title field, select the language in which the resume is written in the Language field, and paste the resume text into the Resume field and click Continue.

   - Upload friend's resume.

     If employees select this option, they must browse for, select, and upload the applicant's resume.

   - Refer friend without submitting a resume.

3. Enters the preferred contact method, name, address, email, and phone information for the applicant that they are referring on the Refer Friend - Contact Details page.

   Employees must enter a first and last name for the applicant.

4. Clicks the Save & Submit button on the Refer Friend - Contact Details page.

   The system creates an applicant record for the applicant, sets the applicant's status to Active, and sets the applicant's disposition to Applied if the employee submitted the referral for one or more job openings. The system automatically records the employee's ID as the applicant's referral source.

5. Confirms that the referral is successfully submitted on the My Referrals page.

   Applicants also receive a confirmation email every time that a referral is submitted. The email includes a URL that enables applicants to access, review, and modify the information provided by the employee. When applicants access their online job applications, the system requires them to register online and create an account.

Applicant Referrals

When applicants apply for job openings online, they can specify referral information if you include the Referrals section in the resume template for that job opening.

See *PeopleSoft Enterprise Candidate Gateway 8.9 PeopleBook*, "Setting Up Candidate Gateway," Setting Up Resume Templates.

When applicants refer employees online:

1. The applicant selects an Employee type recruitment source in the How did you find out about the job? field in the Referral Information group box on the Apply Now - Complete Application page.

   Applicants can select Employee and Marketing type recruitment sources as a referral source in the How did you find out about the job? field. When an applicant selects an Employee type recruitment source, the system adds the Referral Name, Email Address, and Member of your family fields to the group box, which enable the applicant to specify the employee's name, email address, and whether that employee is a family member.

2. The applicant receives an email that confirms that the system received the applicant's online application. If no email address is entered for the applicant, the applicant or referring employee must contact the recruiter directly to have that referral be officially established.

3. The employee receives an email that requests confirmation of the referral, if the applicant entered an email address for the applicant.

   The email includes a link to the Confirm Referral page with the track ID and password that the employee can use to access the referral and confirm or cancel the referral. The email also contains a link to the Review Referral page, where the employee can track the status of the referral.

   An employee's failure to confirm or cancel the referral does not affect the recruitment process for the applicant. However, if the employee does not confirm the referral, the employee is not eligible to receive award payments for the referral.

Recruiters can enter an employee as the referral source for an applicant when they manually add an applicant by using the Add New Applicant (HRS_ADD_APPLICANT) component. Recruiters enter referral information in the Referral Source group box on the Add New Applicant - Application Details page. Recruiters can update referral information for an applicant in the Referral Source group box on the Manage Applicant - Application Details page.

See Chapter 9, "Entering Applicants," Entering Application Details, page 192.

See Chapter 17, "Managing Applicants," Editing Applications, page 347.

See Also

PeopleSoft Enterprise Candidate Gateway 8.9 PeopleBook, "Using Candidate Gateway," Applying for Job Openings

Pages Used to Submit, Confirm, and Review Referrals

Page Name	Object Name	Navigation	Usage
Careers Home	HRS_CE_HM_POST	Self Service, Recruiting Activities, Careers, Careers Home	Search for jobs, access career tools, view received notifications, and view the latest job postings.
Refer Friend - Choose Resume	HRS_ERP_RES_OPTION	Click the Refer a Friend button on the Careers Home page.	Choose a resume option. The options that appear on this page vary depending on the resume template that the system selects.
Refer Friend - Enter Resume Text	HRS_ERP_APPLY_RES	Select the Copy and paste resume text option on the Refer Friend - Choose Resume page and click Continue.	Enter resume details.
Refer Friend - Contact Details	HRS_ERP_APP_PRFILE	Click the Continue button on the Refer Friend - Enter Resume Text page.	Enter a friend's preferred contact method, name, address, email, and phone information.
My Referrals	HRS_ERP_APP_APLC	Click the Save & Submit button on the Refer a Friend - Contact Details page.	Confirm that the referral is submitted.
Confirm Referral	HRS_REF_CONFIRM1	Self Service, Recruiting Activities, Confirm Referral, Confirm Referral-Access Page	Enter the referral track ID and password received by email.
Confirm Referral — Access	HRS_REF_CONFIRM2	Click the Submit button on the Confirm Referral — Access page.	Confirm or cancel the referral initiated by an applicant.
Confirm Referral - Submit Confirmation	HRS_SUBMIT_CONF	Click the Refer this Applicant button on the Confirm Referral page.	Confirm that the referral was successfully submitted.
Confirm Referral - Referral Cancelled	HRS_CNCL_CONF	Click the Cancel button on the Confirm Referral page.	Confirm that the referral was successfully cancelled.
Review Referral	HRS_EE_REVW_SRCH	• Self Service, Recruiting Activities, Check Referral Status, Review Referral • Click the View Completed Referrals link on the My Referrals page.	View the current status of referrals. You can view the eligibility and award payment status for each applicant that you refer.
Review Referral	HRS_EE_REVW_DTL	Click a name link on the Review Referral (HRS_EE_REVW_SRCH) page.	View details for a specific referral.

Administering Hot Jobs

This section provides an overview of hot jobs and discusses how to:

- Name and describe hot job categories.
- Create SQL statements to define job opening selection criteria.
- Remove selected job openings from the hot job category.
- Set up award schedules.

Understanding Hot Jobs

You can set up hot job categories with award schedules and select job openings into each hot job category. Here are some facts about hot jobs:

- The administration of hot jobs occurs independently of any employee referral program.

  The hot job category is like an award category, but you associate the hot job category directly with job openings rather than with an employee referral program. The hot job category is applied against the job opening into which the applicant is hired.

- Hot job awards override employee referral program awards.
- Hot jobs do not override any employee referral program eligibility criteria.

  Hot job awards are paid only if the referral satisfies the employee referral program's employee eligibility criteria.

- The hot job award schedule supersedes the award schedule that is associated with the job opening through the employee referral program award category rules.

  For example, suppose that an employee referral program pays awards six months after an applicant is hired and that the hot job award is paid three months after. In these cases, eligibility is checked at the three-month point but not at the six-month point. The employee referral program eligibility rules apply, but the hot job awards schedule overrides the employee referral program award schedule if all other employee referral program eligibility criteria are met.

  Note. There is no safeguard in the system against creating hot job awards of less value than in the employee referral program award category. Therefore, you must use caution when setting up hot job awards.

- Hot jobs are not effective-dated.

  After job openings are marked as hot jobs, they remain hot jobs until you remove them from the list. Similarly, newly created job openings that meet the criteria to be a hot job are not automatically marked as hot jobs. You must run the selection process before adding or removing any job openings from the hot job list.

Administering Hot Jobs

To administer hot jobs by using the Hot Job Administration (HRS_RULE_HOTJOB) component:

1. Name and describe a hot job category on the Hot Jobs page.
2. Create SQL statements to define job opening selection criteria on the Hot Job Administration - Selection page.
3. Click the Select Hot Jobs button on the Hot Job Administration - Selection page to run the online process to create a list of qualifying job openings.

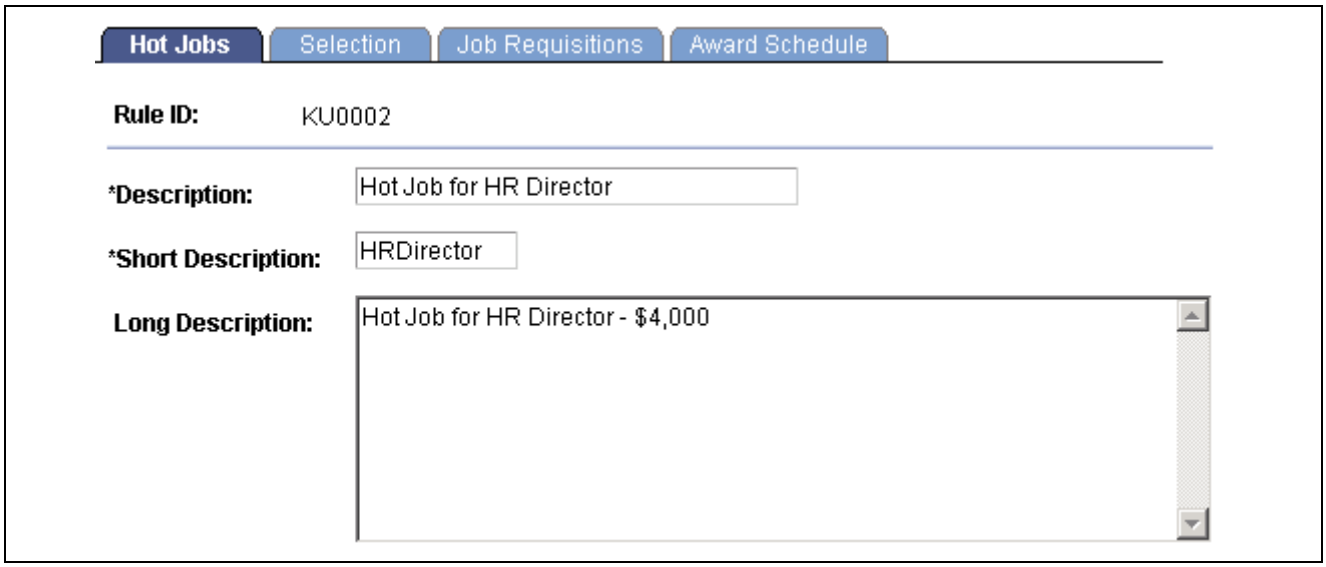
4. Remove selected job openings from the hot job category on the Job Requisitions page.
5. Set up the amounts and timing of awards for the hot job category on the Award Schedule page.

Pages Used to Administer Hot Jobs

Page Name	Object Name	Navigation	Usage
Hot Jobs	HRS_RULE_DEF	Recruiting, Employee Referrals, Hot Jobs, Hot Jobs	Name and describe the hot job category.
Hot Jobs Administration - Selection	HRS_RULE_SQL	Recruiting, Employee Referrals, Hot Jobs, Selection	Create SQL statements to define job opening selection criteria.
View SQL	HRS_VW_SQL	• Click the View SQL link on the Employee Eligibility Rules - Rule SQL page. • Click the View SQL link on the Award Category Rules - Rule SQL page. • Click the View SQL link on the Hot Job Administration - Selection page.	View a SQL statement that the system generates from information that you enter on the Hot Job Administration - Selection page.
Job Requisitions	HRS_RULE_HJ	Recruiting, Employee Referrals, Hot Jobs, Job Requisitions	Remove selected job openings from the hot job category and associate employee referral programs with job openings.
Award Schedule	HRS_RULE_AWD_SCH	Recruiting, Employee Referrals, Hot Jobs, Award Schedule	Set up award schedules.

Naming and Describing Hot Job Categories

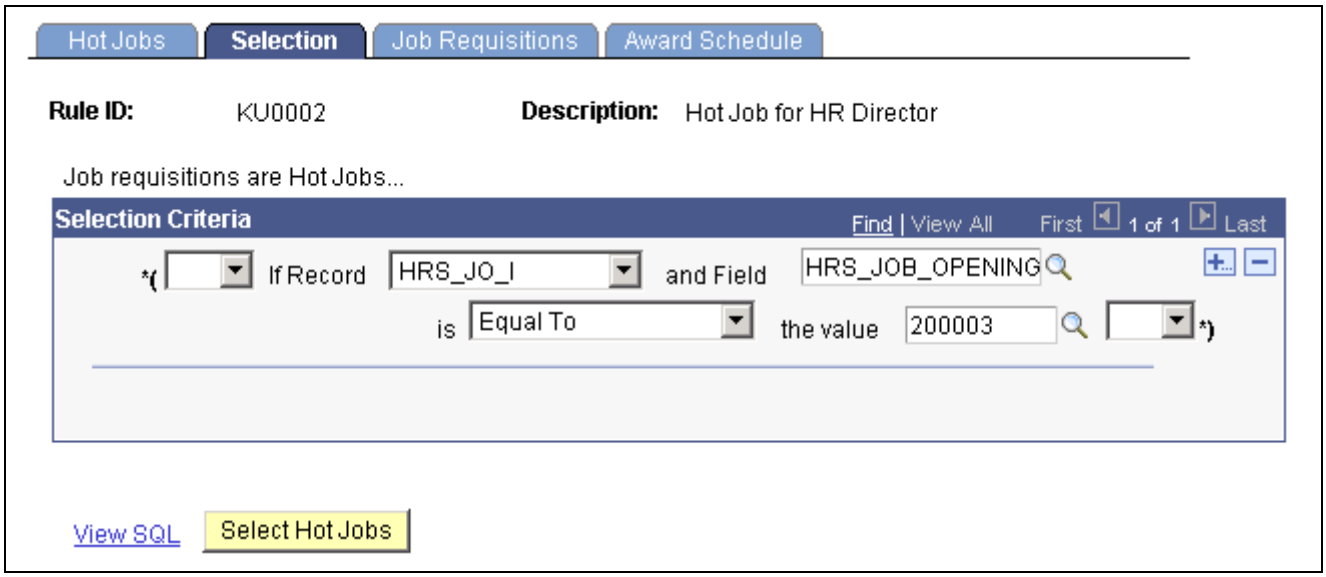
Access the Hot Jobs page.



Hot Jobs page

Creating SQL Statements to Define Job Opening Selection Criteria

Access the Hot Job Administration - Selection page.



Hot Job Administration - Selection page

The Selection page is identical to the Employee Eligibility Rules - Rule SQL page that you use to set up employee eligibility rules with the addition of a Select Hot Jobs button.

See Chapter 7, "Creating Employee Referral Programs," Creating SQL Statements for Employee Eligibility Rules, page 132.

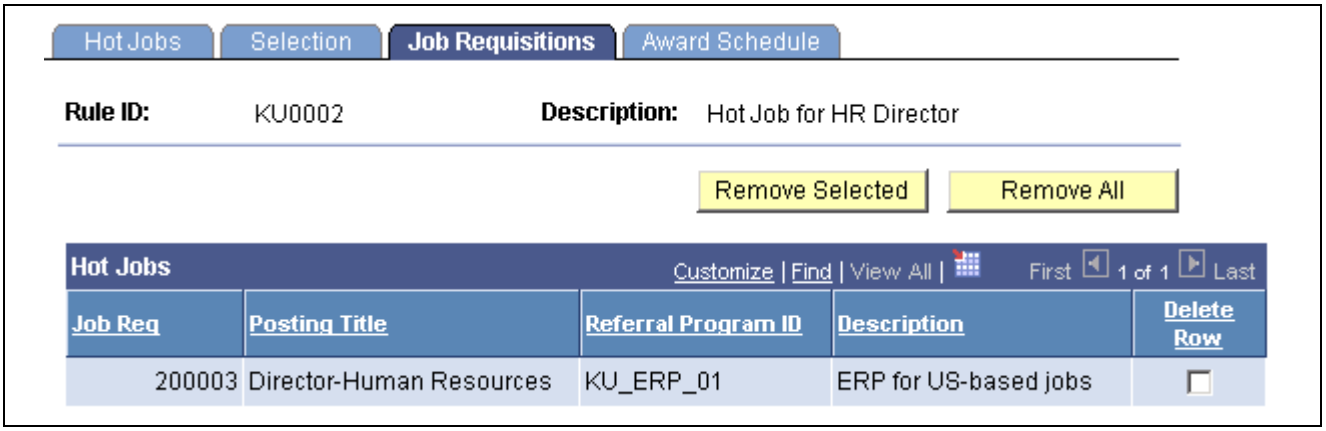
Create SQL statements to define job opening selection criteria and then click the Select Hot Jobs button to load qualifying job openings into the Job Requisitions page.

The system does not list job openings that have already been selected into another hot job category.

If you previously created a list of job openings for this hot job category, the system reapplies the criteria, and any job opening that no longer qualifies does not appear on the list. For example, if *Open* status is a criteria, a job opening that now has *Reopen* status does not appear on the list.

Removing Selected Job Openings from the Hot Job Category

Access the Job Requisitions page.



Job Requisitions page

Remove Selected Click to remove job openings for which you have selected the Delete Row check box. The system removes the job openings when you save.

Remove All Click to remove all job openings from the list. The system removes the job openings when you save.

Hot Jobs

Referral Program ID If you have associated the job opening with an employee referral program, the employee referral program ID appears here. If the job opening is not associated with an employee referral program, select one here. You must associate a job opening with an employee referral program; otherwise, the system cannot determine employee eligibility for awards.

Setting Up Award Schedules

Access the Award Schedule page.

See Chapter 7, "Creating Employee Referral Programs," Setting Up Award Schedules, page 135.

APPENDIX A

Delivered Workflows for Talent Acquisition Manager

This appendix discusses:

- Delivered workflows for Talent Acquisition Manager.
- Delivered notification templates.

See Also

Enterprise PeopleTools 8.45 PeopleBook: Workflow Technology

Enterprise PeopleTools 8.45 PeopleBook: Using PeopleSoft Applications

Delivered Workflows for Talent Acquisition Manager

This section discusses Talent Acquisition Manager workflows. The workflows are listed alphabetically by workflow name.

See Also

Chapter 6, "Working with Approvals," page 115

Chapter 8, "Creating Job Openings," page 143

Chapter 13, "Making Job Offers," page 287

Job Offer Approval

This section discusses the Job Offer Approval workflow.

Description

Event Description	A hiring manager or recruiter submits a job offer.
Action Description	The system routes the job offer to approvers for approval or denial.
Notification Method	Email and worklist.

Workflow Objects

Event	Launch, Approve
Participant	Approvers
Email Template	JobOfferApproval
Business Process	SAC_APPROVALS
Business Activity	SAC_AW_ROUTE

Job Offer Approved

This section discusses the Job Offer Approved workflow.

Description

Event Description	Final approver approves a job offer.
Action Description	The system marks the job offer as approved and notifies the requester.
Notification Method	Email and worklist.

Workflow Objects

Event	OnApprove
Participant	Requester
Email Template	JobOfferApproved
Business Process	SAC_APPROVALS
Business Activity	SAC_AW_ROUTE

Job Offer Deny

This section discusses the Job Offer Deny workflow.

Description

Event Description	An approver denies the job offer.
Action Description	The system marks the job offer as denied, ending the workflow process. The system notifies the requester.
Notification Method	Email and worklist.

Workflow Objects

Event	OnDeny
Participant	Requester
Email Template	JobOfferDeny
Business Process	SAC_APPROVALS
Business Activity	SAC_AW_ROUTE

Job Offer Error

This section discusses the Job Offer Error workflow.

Description

Event Description	An approval workflow error occurred in the approval routing. This can occur as a result of the approval process configuration or because of approval rules or criteria violations.
Action Description	The system routes the job offer to the administrator for resolution.
Notification Method	Email and worklist.

Workflow Objects

Event	Error
Participant	Administrator
Email Template	JobOfferError
Business Process	SAC_APPROVALS
Business Activity	SAC_AW_ROUTE

Job Offer Escalation

This section discusses the Job Offer Escalation workflow.

Description

Event Description	An approver has not responded to a job offer within the allotted time.
Action Description	The system notifies the approver and the approver's supervisor and routes the job offer to the next step.
Notification Method	Email and worklist.

Workflow Objects

Event	Escalate
Participant	Dynamic
Email Template	JobOfferEscalation
Business Process	SAC_APPROVALS
Business Activity	SAC_AW_ROUTE

Job Offer Review

This section discusses the Job Offer Review workflow.

Description

Event Description	An approver routes the job offer to reviewers to review.
Action Description	The system notifies reviewers that they must review the job offer.
Notification Method	Email and worklist.

Workflow Objects

Event	Review
Participant	Reviewers
Email Template	JobOfferReview
Business Process	SAC_APPROVALS
Business Activity	SAC_AW_ROUTE

Job Offer Termination

This section discusses the Job Offer Termination workflow.

Description

Event Description	A user that has access to the job offer makes a change to a field that might require the job offer to be evaluated again or an administrator overrides the approval process.
Action Description	The system terminates the job offer approval process and notifies the requester.
Notification Method	Email and worklist.

Workflow Objects

Event	Termination
Participant	Requester
Email Template	JobOfferTermination
Business Process	SAC_APPROVALS
Business Activity	SAC_AW_ROUTE

See Also

Chapter 13, "Making Job Offers," Understanding Job Offer Approvals, page 291

Job Opening Approval

This section discusses the Job Opening Approval workflow.

Description

Event Description	A hiring manager or recruiter submits a job opening.
Action Description	The system routes the job opening to approvers for approval or denial.
Notification Method	Email and worklist.

Workflow Objects

Event	Approve, Launch
Participant	Approvers
Email Template	JobOpeningApproval
Business Process	SAC_APPROVALS
Business Activity	SAC_AW_ROUTE

Job Opening Approved

This section discusses the Job Opening Approved workflow.

Description

Event Description	Final approver approves a job opening.
Action Description	The system marks the job opening as approved and notifies the requester.
Notification Method	Email and worklist.

Workflow Objects

Event	OnApprove
Participant	Requester
Email Template	JobOpeningApproved
Business Process	SAC_APPROVALS
Business Activity	SAC_AW_ROUTE

Job Opening Deny

This section discusses the Job Opening Deny workflow.

Description

Event Description	An approver denies the job opening.
Action Description	The system marks the job opening as denied, ending the workflow process. The system notifies the requester.
Notification Method	Email and worklist.

Workflow Objects

Event	OnDeny
Participant	Requester
Email Template	JobOpeningDeny
Business Process	SAC_APPROVALS
Business Activity	SAC_AW_ROUTE

Job Opening Error

This section discusses the Job Opening Error workflow.

Description

Event Description	An approval workflow error occurred in the approval routing. This can occur as a result of the approval process configuration or because of approval rules or criteria violations.
Action Description	The system routes the job opening to the administrator for resolution.
Notification Method	Email and worklist.

Workflow Objects

Event	Error
Participant	Administrator
Email Template	JobOpeningError
Business Process	SAC_APPROVALS
Business Activity	SAC_AW_ROUTE

Job Opening Escalation

This section discusses the Job Opening Escalation workflow.

Description

Event Description	An approver has not responded to a job opening within the allotted time.
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Participant	Dynamic
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Event Description	An approver routes the job opening to reviewers to review.
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Participant	Reviewers
Email Template	JobOpeningReview
Business Process	SAC_APPROVALS
Business Activity	SAC_AW_ROUTE

Job Opening Termination

This section discusses the Job Opening Termination workflow.

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Event Description	A user that has access to the job opening makes a change to a field that might require the job opening to be evaluated again or an administrator overrides the approval process.
Action Description	The system terminates the job opening approval process and notifies the requester.
Notification Method	Email and worklist.

Workflow Objects

Event	Termination
Participant	Requester
Email Template	JobOpeningTermination
Business Process	SAC_APPROVALS
Business Activity	SAC_AW_ROUTE

See Also

Chapter 8, “Creating Job Openings,” Understanding Job Opening Approvals, page 174

Delivered Notification Templates

This table lists the delivered notification templates for Talent Acquisition Manager.

Template Name	Description
ApplicantStsEffct	Applicant Status Change
AutomatchNotification	Recruiter Job Opening Notify

Template Name	Description
CongratulatoryEmail	CongratulatoryEmail
HRS_APPLICANT_PASSWORD	Applicant Password/User ids
HRS_APP_RTE	Applicants Route Notification
HRS_CE_APPL_APPLY_JOB	Submit resume notification
HRS_CE_EML_FRND	Email a Friend
HRS_FORWARD_APPLICANT	Forward Applicant
HRS_HROI_DRAFT	Notify on Draft Status
HRS_HROI_REJECT	Notify on Reject
HRS_HROI_SUCCESS	Notify on Success
HRS_HROI_UNRESOLVED	Notification sent on Unresolved
HRS_INTVWSCHED_APPL	Notify Interview Applicant
HRS_INTVW_EVAL_RMNDR	Interview Evaluation Reminder
HRS_INTVW_SCHED_TEAM	Notify Interview Team
HRS_INT_EVAL_SUBMIT	Interview Evaluation Submit
HRS_UPDATE_REFERENCES	Applicant References
HR_ERR_NOTIF	Hire Error Notification Template
HR_HIRE_NOTIF	Hire Notification template
JobAgentNotification	Applicant Job Agent Notify
JobOfferApproval	Job Offer Approval Routing
JobOfferApproved	Job Offer Has Been Approved
JobOfferDeny	Job Offer Has Been Denied
JobOfferError	Job Offer Error
JobOfferEscalation	Job Offer Escalation
JobOfferReview	Job Offer Review
JobOfferTermination	Job Offer Termination
JobOpeningApproval	Job Opening Approval Routing
JobOpeningApproved	Job Opening Has Been Approved

Template Name	Description
JobOpeningDeny	Job Opening Has Been Denied
JobOpeningError	Job Opening Error
JobOpeningEscalation	Job Opening Escalation
JobOpeningReview	Job Opening Review
JobOpeningStsEffct	Job Opening Status Change
JobOpeningTermination	Job Opening Termination
OtherStsEffct	Status Change

APPENDIX B

Delivered Permission Lists and Roles for Talent Acquisition Manager

This section provides an overview of how security is used in PeopleSoft Enterprise Talent Acquisition Manager and list the delivered permission lists and roles.

Delivered Permission Lists and Roles

This following table list Talent Acquisition Manager delivered permission lists and roles:

Permission List	Roles	Description
HCCPRS0000	Recruitment User	Recruiting Solutions Hidden
HCCPRS1000	Recruitment Administrator	Set Up Recruiting Solutions
HCCPRS1010	RS Technical Administrator Recruitment Administrator	Set Up RS Integrations
HCCPRS1020	RS Approval Administrator Recruitment Administrator	Set Up Approvals
HCCPRS1030	Hiring Manager Recruiter Recruitment Administrator	Candidate Management
HCCPRS1040	Hiring Manager Recruiter Recruitment Administrator	Job Opening Management
HCCPRS1050	Applicant	RS Applicant Self-Service
HCCPRS1060	Hiring Manager Recruiter Recruitment Administrator	RS Applicant List
HCCPRS1070	Federal Recruiter	(USF) Recruiting Solutions

Permission List	Roles	Description
HCCPRS1090	Hiring Manager Recruiter Recruitment Administrator	RS Reports
HCCPRS1100	External Applicant	External Applicant
HCCPRS1120	Employee	Employee Recruitment
HCCPRS1130	Hiring Manager Recruiter Recruitment Administrator	Recruiting Solutions Pagelets
HCCPRS1140	Recruitment Administrator	Recruiting Teams
HCCPRS1150	Recruiter Recruitment Administrator	Resume Management
HCCPRS1160	RS Technical Administrator Recruitment Administrator	RS Technical Utilities
HCCPRS1170	Hiring Manager Recruiter Recruitment Administrator	Interviews
HCCPRS1180	Recruiter Recruitment Administrator	Manage Interviews
HCCPRS1190	Recruitment Administrator	RS Salary Package Model
HCCPRS1200	Recruiter Recruitment Administrator	RS Saved Searches
HCCPRS1210	Recruitment Administrator	Checklists
HCCPRS1220	Hiring Manager Recruiter Recruitment Administrator	RS Prepare for Hire
HCCPRS1230	Hiring Manager Recruiter Recruitment Administrator	RS Contracts

Permission List	Roles	Description
HCCPRS1240	Hiring Manager Recruiter Recruitment Administrator	RS Send Correspondence
HCCPRS1250	Recruiter Recruitment Administrator	RS Candidate Data Full Access
HCCPRS1260	Hiring Manager	RS Candidate Data Restricted
HCCPRS1270	Recruitment Administrator	JO from Position Creation
HCCPRS1280	Recruitment Administrator	Manage Duplicate Applicants
HCSPRS9020	Recruitment User	RS Standard Message Channels
HCSPRS9030	Recruitment User	RS Web Libraries
HCSPRS9040	Recruitment User	RS Standard CIs

APPENDIX C

PeopleSoft Talent Acquisition Manager Reports

PeopleSoft Enterprise Talent Acquisition Manager supplies a group of standard reports to help you review the entries in the various tables you use to set up controls for your recruiting system.

This appendix provides summary tables of Talent Acquisition Manager reports.

Note. For samples of these reports, see the PDF files published on CD-ROM with your documentation.

See Also

PeopleTools PeopleBook: Process Scheduler

Talent Acquisition Manager Reports: A to Z

This table lists Talent Acquisition Manager reports by report ID. If you need more information about a report, refer to the report details at the end of this appendix.

Report ID and Report Name	Description	Navigation	Run Control Page
HRS001 Adverse Impact Analysis (USA)	Analyzes information on recruitment and hiring practices.	Recruiting, Reports, Adverse Impact (USA), Adverse Impact Analysis (USA)	RUN_CNTL_REG_INTRO
HRS001UK Adverse Impact (UK)	Lists job offers and applications by ethnic groups and gender.	Recruiting, Reports, Adverse Impact (UK), Adverse Impact (UK)	RUNCTL_FROMTHRU
HRS011 Applicant Summary by Job	For each job opening, this report lists the number of applicants and percentage of total applicants that applied, sorted by source type and specific source. (SQR).	Recruiting, Report, Applicant Summary by Job, Applicant Summary by Job	PRCSRUNCNTL
HRS012 Applicant Summary by Source	Lists the number of applicants and percentage of total applicants sorted by source type and specific source (regardless of job opening). (SQR).	Recruiting, Report, Applicant Summary by Source, Applicant Summary by Source	PRCSRUNCNTL
HRS820 Candidate Evaluations List	Produces three Evaluation of Candidate reports sorted by applicant ID, name, and score. (Crystal)	Recruiting, Reports, Candidate Evaluations List, Candidate Evaluations List	HRS_RUN_HRS820

Report ID and Report Name	Description	Navigation	Run Control Page
HRS005 Candidate Listing	This report combines job opening information with a list of candidates being interviewed for the position. It groups requisitions by Department ID. (SQR) For each candidate interviewed, the report displays the following: employee ID, name, status in the interview process (active, inactive, hired, withdrawn), last interview step completed, and any offers made.	Recruiting, Reports, Candidate Listing, Candidate Listing	PRCSRUNCNTL
HRS821 Certificate of Eligibles	Generates a Certificate of Eligibles report. (Crystal)	Recruiting, Reports, Certificate of Eligibles, Certificate of Eligibles	HRS_RUN_HRS821
HRS032 Full Text Vacancy Report	Generates a hard copy of the full vacancy announcement. This must be run after you have created the USA Jobs Feed. (SQR)	Recruiting, Reports, Full Text Vacancy, Full Text Vacancy	RUN_HRS032
HRS034 Job Code and Position Audit	Cross references position numbers and job codes.	Recruiting, Reports, Job Code and Position Audit	RUNCTL_FGASOFDT
HRS002 Job Group Movement Analysis	Provides racial and gender demographic data regarding your hiring process. (SQR).	Recruiting, Reports, Job Group Movement Analysis, Job Group Movement Analysis	RUN_CNTL_REG_INTRO
HRS014 Job Posting	Extracts job posting data from the database and formats it for merging into Microsoft Word documents. (SQR, Word for Windows).	Recruiting, Reports, Job Posting, Job Posting	HRS_RUN_APP014
HRS816 Priority Placement Table	List the valid priority placement values.	Recruiting, Reports, Priority Placement Table, Priority Placement Table	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
HRS006 Job Opening Cost Analysis	Provides a breakdown of expense types and amounts for each job opening. (SQR) For each job opening, the report lists the job opening number, job code, position number, status, title of the position offered, and the recruiter's name. The last two columns contain a breakdown of each type of expense incurred and its monetary amount, including a total by job opening number. A department summary includes an expense total for all job openings, each expense category, and calculates a department-average cost-per-hire amount.	Recruiting, Reports, Job Opening Cost Analysis, Job Opening Cost Analysis	PRCSRUNCNTL
HRS003 Job Opening Status Listing	For each job opening, the report lists job information, job opening status, recruiter, the number of applicants, and expenses information.	Recruiting, Reports, Job Opening Status, Job Opening Status	PRCSRUNCNTL
PKG004 Salary Package Model	Lists applicant salary package models.	Recruiting, Reports, Salary Package Model, Salary Package Model	HRS_RUN_PKG004_APP
HRS010 Vacant Budgeted Positions	Lists all vacant budgeted positions.	Recruiting, Reports, Vacant Budgeted Positions, Vacant Budgeted Positions	RUN_HRS010

Glossary of PeopleSoft Terms

absence entitlement This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.

absence take This element defines the conditions that must be met before a payee is entitled to take paid time off.

academic career In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).

academic institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

academic organization In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.

academic plan In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.

academic program In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.

accounting class In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.

accounting date The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.

accounting split The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.

accumulator You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.

action reason The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration,

PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

action template In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

activity In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

address usage In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.

adjustment calendar In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.

administrative function In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.

admit type In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.

agreement In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.

allocation rule In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.

alternate account A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.

analysis database In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered for satisfying a requirement but that are rejected. It also contains information on

courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.

Application Messaging PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft and third-party applications. An application message defines the records and fields to be published or subscribed to.

AR specialist Abbreviation for *receivables specialist.* In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.

arbitration plan In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.

assessment rule In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.

asset class An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.

attribute/value pair In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.

audience In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.

authentication server A server that is set up to verify users of the system.

base time period In PeopleSoft Business Planning, the lowest level time period in a calendar.

benchmark job In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.

billing career In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.

bio bit or bio brief In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.

book In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.

branch A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.

budgetary account only An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."

budget check In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.

budget control In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

budget period The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.

business activity The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.

business event In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).

business process A standard set of 17 business processes are defined and maintained by the PeopleSoft product families and are supported by Business Process Engineering group at PeopleSoft. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth.

See also *detailed business process.*

business task The name of the specific function depicted in one of the business processes.

business unit A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.

buyer In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.

campus In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.

catalog item In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, “Introduction to Microsoft Word.” A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.

catalog map In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company’s catalog.

catalog partner In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.

categorization Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.

category In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.

channel In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.

ChartField A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.

ChartField balancing You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit The process of editing journal lines for valid ChartField combinations based on user-defined rules.

ChartKey One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.

checkbook In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.

checklist code In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.

class In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.

See also *course.*

Class ChartField A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*

clearance In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.

clone In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

cohort In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *division*.

collection To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.

collection rule In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.

comm key See *communication key.*

communication key In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called *comm keys* or *speed keys*) can be created for background processes as well as for specific users.

compensation object In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.

compensation structure In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.

component interface A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft database information using a program instead of the PeopleSoft client.

condition In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.

configuration parameter catalog Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.

configuration plan In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.

constituents In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).

content reference Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.

context In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.

In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions.

In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.

control table Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.

cost profile A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.

cost row A cost transaction and amount for a set of ChartFields.

course In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab.

See also *class*.

course share set In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.

current learning In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.

data acquisition In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).

data cube In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.

data elements Data elements, at their simplest level, define a subset of data and the rules by which to group them.

For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.

dataset A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.

delivery method type In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

detailed business process A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.

dimension In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.

directory information tree In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.

division In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *cohort*.

document sequencing A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

dynamic detail tree A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.

edit table A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.

effective date A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.

EIM ledger Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

elimination set In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

equitization In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

equity item limit In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.

event A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.

In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.

event propagation process In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.

exception In PeopleSoft Receivables, an item that either is a deduction or is in dispute.

exclusive pricing In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.

fact In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.

financial aid term In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.

forecast item A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.

fund In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.

gap In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.

generic process type In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.

gift table In PeopleSoft Enterprise Campus Solutions, a table or so-called *donor pyramid* describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.

GL business unit Abbreviation for *general ledger business unit.* A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.

See also *business unit*.

GL entry template Abbreviation for *general ledger entry template.* In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.

GL Interface process Abbreviation for *General Ledger Interface process.* In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.

group In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.

incentive object In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.

incentive rule In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.

incur In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.

initiative In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.

inquiry access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.

See also *update access.*

institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

integration A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft applications to work seamlessly with other PeopleSoft applications or with third-party systems or software.

integration point An interface that a system uses to communicate with another PeopleSoft application or an external application.

integration set A logical grouping of integrations that applications use for the same business purpose. For example, the integration set ADVANCED_SHIPPING_ORDER contains all of the integrations that notify a customer that an order has shipped.

item In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).

In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.

In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.

item shuffle In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

joint communication In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

keyword In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.

KPI An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

LDIF file Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft data and directory data.

learner group In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.

learning components In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.

learning environment In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.

learning history In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.

ledger mapping You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

library section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.

linked section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.

linked variable In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.

LMS Abbreviation for *learning management system.* In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.

load In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.

local functionality In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.

location Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a *1*—is the address you use most often and may be different from the main address.

logistical task In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

market template In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.

mass change In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution.

See also *3C engine*.

match group In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.

MCF server Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

merchandising activity In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

meta-SQL Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.

metastring Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.

multibook In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).

multicurrency The ability to process transactions in a currency other than the business unit's base currency.

national allowance In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.

need In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package

	is based on the amount of financial need. The process of determining a student's need is called *need analysis.*
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also *compensation object.*
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
payment shuffle	In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.
pending item	In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	See *event.*
PeopleSoft Pure Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
person of interest	A person about whom the organization maintains information but who is not part of the workforce.
personal portfolio	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.

plan context In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.

plan template In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.

planned learning In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.

planning instance In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.

population In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it.

See also *division* and *cohort*.

portal registry In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.

price list In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.

price rule In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

price rule condition In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.

price rule key In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.

primacy number In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.

primary name type In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.

process category In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.

process group In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.

process definition Process definitions define each run request.

process instance A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.

process job You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.

process request A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.

process run control A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.

product A PeopleSoft or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products are displayed with the product name and release number.

product category In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.

product family A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified PeopleSoft partners.

product line The name of a PeopleSoft product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.

programs In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

progress log In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.

project transaction In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

promotion In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

prospects

In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution.

In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.

publishing

In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

rating components

In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.

record group

A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.

record input VAT flag

Abbreviation for *record input value-added tax flag.* Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.

record output VAT flag

Abbreviation for *record output value-added tax flag.*

See *record input VAT flag.*

recname

The name of a record that is used to determine the associated field to match a value or set of values.

recognition

In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.

reference data

In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.

reference object

In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

reference transaction

In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

regional sourcing

In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

relationship object In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.

remote data source data Data that is extracted from a separate database and migrated into the local database.

REN server Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

reversal indicator In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.

role Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.

role user A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.

roll up In a tree, to roll up is to total sums based on the information hierarchy.

run control A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.

run control ID A unique ID to associate each user with his or her own run control table entries.

run-level context In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.

SCP SCBM XML message Abbreviation for *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* PeopleSoft EnterpriseOne Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.

search query You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.

search/match In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.

seasonal address In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.

section In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.

security event In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

serial genealogy In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

service impact In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.

service indicator In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.

session In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.

In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.

session template In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.

setup relationship In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.

share driver expression In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.

single signon With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.

source key process In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.

source transaction In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.

speed key See *communication key.*

SpeedChart A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.

SpeedType A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.

staging A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

standard letter code In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.

statutory account Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

storage level In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.

subcustomer qualifier A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.

Summary ChartField You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).

summary ledger An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.

summary time period In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

summary tree A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

syndicate To distribute a production version of the enterprise catalog to partners.

system function In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.

TableSet A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.

TableSet sharing Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.

target currency The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

tax authority In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.

template A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

territory In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

third party A company or vendor that has extensive PeopleSoft product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft applications.

3C engine Abbreviation for *Communications, Checklists, and Comments engine.* In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.

3C group Abbreviation for *Communications, Checklists, and Comments group.* In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.

TimeSpan A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.

trace usage In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.

transaction allocation In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.

transaction state In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and "picked up" by a different section for further processing.

Translate table A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.

tree The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

tuition lock In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or *locked*) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

unclaimed transaction In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.

universal navigation header Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

update access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.

See also *inquiry access.*

user interaction object In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

VAT exception Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.

VAT exempt Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.

VAT exoneration Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.

VAT suspension Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.

warehouse A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

work order In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.

worker A person who is part of the workforce; an employee or a contingent worker.

workset A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.

worksheet A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

worklist The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

XML link The XML Linking language enables you to insert elements into XML documents to create a links between resources.

XML schema An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.

XPI Abbreviation for *eXtended Process Integrator.* PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with EnterpriseOne applications.

yield by operation In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

zero-rated VAT Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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