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PeopleSoft Enterprise Talent Acquisition Manager 9.0 PeopleBook

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Contents

General Preface

About This PeopleBook Preface xxi

PeopleSoft Enterprise Application Prerequisites xxi

Application Fundamentals xxi

Documentation Updates and Printed Documentation xxii

Obtaining Documentation Updates xxii

Downloading and Ordering Printed Documentation xxii

Additional Resources xxiii

Typographical Conventions and Visual Cues xxiv

Typographical Conventions xxiv

Visual Cues xxv

Country, Region, and Industry Identifiers xxv

Currency Codes xxvi

Comments and Suggestions xxvi

Common Elements Used in PeopleBooks xxvi

Preface

PeopleSoft Enterprise Talent Acquisition Manager Preface xxix

PeopleSoft Products xxix

PeopleSoft Enterprise HRMS Application Fundamentals xxix

PeopleBook Structure xxix

Chapter 1

Getting Started with Talent Acquisition Manager 1

Talent Acquisition Manager Overview 1

Talent Acquisition Manager Integrations 3

Talent Acquisition Manager Implementation 3

Chapter 2

Setting Up Recruiting Processes 5

Understanding Recruiting Processes Implementation 5

Setting Up Implementation Defaults 6

Page Used to Set Up Implementation Defaults 6

Copyright © 1988-2006, Oracle. All rights reserved.

Selecting PeopleSoft Applications for Your Installation....6
Setting Up Talent Acquisition Manager Implementation Defaults....7
Pages Used to Set Up Talent Acquisition Manager Implementation Defaults....7
Defining Recruiting Installation Defaults....7
Specifying Starting Numbers for System-Assigned Numbers....10
Setting Up Sites....12
Understanding Sites....13
Prerequisites....13
Pages Used to Set Up Sites....13
Setting Up Sites....14
Setting Up Job Openings....15
Pages Used to Set Up Job Openings....16
Defining Recruiting Locations....16
Defining Recruiter Roles....17
Creating Teams....17
Setting Up Job Postings....18
Understanding Job Posting Setup....18
Pages Used to Set Up Job Postings....19
Defining Posting Description Types....19
Creating Posting Descriptions....19
Setting Up Applications....20
Understanding Attachment Types....20
Page Used to Set Up Applications....21
Defining Attachment Types....21
Setting Up Applicant Communications....22
Pages Used to Set Up Applicant Communications....22
Defining Contact Method Types....22
Working with XML Publisher....23
Setting Up Questionnaires....24
Understanding Questionnaire Setup....25
Pages Used to Set Up Questionnaires....26
Setting Up Answer Definitions....26
Setting Up Question Definitions....27
Setting Up Question Set Definitions....27
Setting Up Applicant Screening....29
Understanding Screening Definitions....29
(USF) Understanding Veterans Preference Codes....29
(USF) Understanding Priority Placement Codes....30
Pages Used to Set Up Applicant Screening....31
Setting Up Screening Definitions....31

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(USF) Setting Up Veterans Preference Codes....33
(USF) Setting Up Priority Placement Codes....34
Setting Up Interview Evaluations....35
Understanding Interview Evaluation Setup....36
Pages Used to Set Up Interview Evaluations....36
Creating Interview Evaluation Categories....36
Creating Interview Ratings....37
Creating Interview Types....37
Setting Up Job Offers....38
Understanding Job Offer Setup....38
Pages Used to Set Up Job Offers....39
Creating Job Offer Component Types....39
Entering Job Offer Component Information....39
Setting Up the Hiring Process....40
Pages Used to Set Up the Hiring Process....41
Defining Data to Transfer....41

Chapter 3
Setting Up Recruiting Templates....43
Understanding Recruiting Templates....43
Setting Up Resume Templates....44
Understanding Resume Templates....44
Pages Used to Set Up Resume Templates....47
Defining Basic Information for Resume Templates....47
Defining Resume Template Pages and Sections....47
(IRL) Defining Resume Template Pages and Sections for Community Background Information....49
Setting Up Job Opening Templates....50
Understanding Job Opening Templates....50
Prerequisites....51
Pages Used to Set Up Job Opening Templates....51
Identifying Job Opening Templates....51
Defining Job Opening Template Structure....51
Setting Up Job Opening Posting Templates....53
Understanding Job Opening Posting Templates....53
Prerequisites....53
Page Used to Set Up Job Opening Posting Templates....53
Creating a Job Opening Posting Template....53
Setting Up Screening Templates....55
Understanding Screening Templates....55

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Prerequisite.....55
Page Used To Set Up Screening Templates.....55
Creating a Screening Template.....55
Setting Up Interview Evaluation Templates.....57
Understanding Interview Evaluation Templates.....57
Prerequisites.....58
Page Used to Set Up Interview Evaluation Templates.....58
Creating an Interview Evaluation Template.....58
Setting Up Recruitment Templates.....60
Understanding Recruitment Templates.....60
Prerequisites.....60
Pages Used to Set Up Recruitment Templates.....61
Linking Templates to Recruitment Templates.....61
Assigning Segmentation Values to Recruitment Templates.....63

Chapter 4
Setting Up Recruiting Statuses.....65
Understanding Recruiting Statuses.....65
Understanding the Setup of Recruiting Statuses.....65
Setting Up Recruiting Statuses.....77
Pages Used to Set Up Recruiting Statuses.....78
Defining Statuses and Reasons Codes.....78
Setting Up Recruitment Rules.....80
Defining Successors.....81
Defining the Effects of Status Changes.....82

Chapter 5
Setting Up Third Party Integrations.....85
Understanding Third Party Integrations.....85
Understanding Job Board Setup.....86
Understanding Resume Extractor Setup.....86
Understanding Background Screener Setup.....87
Setting Up Recruiting Vendors.....88
Understanding How to Set Up Recruiting Vendors.....88
Pages Used to Set Up Recruiting Vendors.....88
Loading a Vendor Configuration File.....88
Defining Settings for Pre-Employment Vendors.....90
Setting Up Data Mapping.....91

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Understanding Data Mapping....92
Pages Used to Set Up Data Mapping....94
Creating Data Mapping Assignments....94
Setting Up Categories....95
Viewing Key Lists....96
Viewing Value Lists....96
Mapping Unmapped Data....97
Mapping Keys....98
Mapping Values....99
Mapping Inbound Postal Information....100
Mapping Outbound Postal Information....101
Setting Up Autoscreening....102
Page Used to Set Up Autoscreening....103
Defining Criteria to Automatically Screen Incoming Resumes....103
Setting Up Recruitment Sources....103
Understanding Recruitment Sources....104
Prerequisites....105
Pages Used to Set Up Recruitment Sources....106
Defining Recruiting Contacts....106
Selecting a Recruitment Source Type....108
Defining Sites for a Company Recruitment Source....108
Defining Sites and Subsources for a Marketing Recruitment Source....109
Defining Business Rules for Incoming Resumes....110
Defining Contacts for a Recruitment Source....113
Setting Up Resume Email Accounts....114
Understanding Resume Email Accounts....114
Pages Used to Define Resume Email Accounts‘....116
Setting Up Resume Email Accounts....116
Viewing Lists of Emails....117
Viewing Email Attachments and Selecting Resumes....118
Reviewing the Integration Transaction Log....119
Pages Used to Review the Integration Transaction Log....119
Reviewing the Integration Transaction Log....119

Chapter 6
Creating Job Openings....121
Understanding How Job Opening are Created....121
Prerequisites....124
Creating Job Openings....124

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Understanding How To Create Job Openings....124
Pages Used to Create Job Openings....126
Entering Primary Job Opening Information....126
Entering Job Opening Details....128
Adding Locations to Job Openings....143
(USF) Entering Candidate Name Requests....144
Adding Screening Levels....145
Adding Screening Criteria to Screening Levels....145
Defining Competency Points....149
Adding Job Posting Details....149
Creating Job Openings from Open Positions....152
Understanding Job Opening Creation from Open Positions....152
Pages Used to Create Job Openings from Open Positions....153
Creating Job Openings from Open Positions....153
Cloning Job Openings....154
Understanding Cloning Job Openings....154
Pages Used to Clone Job Openings....155
Cloning a Job Opening....155
Approving Job Openings....155
Understanding Job Opening Approvals....156
Pages Used to Approve Job Openings....159
Viewing Pending Approvals....159
Approving a Job Opening....159
Adding Another Approver or Reviewer....160

Chapter 7
Entering Applicants....163
Understanding How Applicant Data is Entered....163
Entering Contact Information....165
Page Used to Enter Contact Information....165
Entering Contact Information Details....165
Entering Application Details....167
Pages Used to Enter Application Details....168
Adding Application Information....169
Entering Application Details....170
Entering References....182
Pages Used to Enter References....183
Requesting References....183
Entering Applicant Eligibility and Identity Information....184

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Pages Used to Enter Applicant Eligibility and Identity Information.....185
Adding Eligibility and Identity Information.....185

Chapter 8
Screening and Routing Applicants.....197
Screening Applicants.....197
Understanding the Screening Process.....197
Prerequisites.....201
Pages Used to Screen Applicants.....202
(USF) Running Priority Placement.....202
Reviewing Applicants Linked to Job Opening.....203
Rating Applicants.....204
Reviewing Screening Levels.....205
Reviewing and Editing Screening Criteria.....206
Running Screening Levels.....207
Reviewing Screening Results.....208
Reviewing Score Details.....210
Applying Results.....211
(USF) Assigning Competitive and Noncompetitive Statuses.....211
(USF) Ranking Applicants.....212
(USF) Processing Certificate of Eligibles.....214
Routing Applicants.....214
Pages Used to Route Applicants.....215
Routing Applicants.....215

Chapter 9
Interviewing Applicants.....217
Scheduling Interviews.....217
Understanding Applicant Interviews.....217
Pages Used to Schedule Applicant Interviews.....218
Scheduling Applicant Interviews.....218
Rescheduling Interviews.....221
Checking Interviewer Availability.....221
Completing Interview Evaluations.....222
Understanding Interview Evaluations.....222
Prerequisite.....222
Pages Used to Complete Interview Evaluations.....223
Completing an Interview Evaluation.....223

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Sending Interview Evaluation Reminders....224
Understanding Interview Evaluation Reminders....225
Page Used to Send Interview Evaluation Reminders....225
Sending Interview Evaluation Reminders....225
Making Final Recommendations....225
Understanding Final Recommendations....225
Prerequisite....225
Pages Used to Make Final Recommendations....226
Making Final Recommendations....226
Reviewing Interview Schedules and Evaluations....228
Pages Used to Review Interview Schedules and Evaluations....228
Reviewing Applicant Interview Schedules and Evaluations....228
Reviewing Interview Calendars....230

Chapter 10
Making Job Offers....233
Creating Job Offers....233
Understanding Job Offers....233
Prerequisites....234
Pages Used to Prepare Job Offers....234
Creating a Job Offer....234
Approving Job Offers....238
Understanding Job Offer Approvals....238
Prerequisites....241
Pages Used to Approve Job Offers....242
Viewing and Approving Pending Approvals....242
Approving Job Offers....243
Adding Another Approver or Reviewer....244
Editing or Deleting Job Offers....244
Pages Used to Edit or Delete Job Offers....244
Editing or Deleting Job Offers....244

Chapter 11
Hiring Applicants....245
Completing Pre-Employment Checks....245
Understanding Pre-Employment Checks....245
Prerequisite....245
Pages Used to Complete Pre-Employment Checks....246

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Submitting Pre-Employment Check Requests....246
Reviewing Pre-employment Check Details....247
Creating Applicant Contracts....247
Understanding Applicant Contracts....248
Prerequisites....248
Pages Used to Manage Applicant Contracts....248
Defining Basic Contract Information....248
Defining Contract Clause Information....250
Defining the Signature Date and Probation Information....252
(AUS) Creating Salary Packages....252
Understanding Salary Packages....253
Hiring Applicants....253
Understanding Hiring Applicants....253
Prerequisites....254
Pages Used to Hire Applicants....255
Preparing for Hire....255
Reviewing Search/Match Results....257
(AUS) Copying Salary Packages to Human Resources....258
Understanding How to Copy Salary Packages to the Human Resources Database....258

Chapter 12
Managing Job Openings....259
Searching for Job Openings....259
Understanding Job Opening Searches....259
Pages Used to Search for Existing Job Openings....260
Building the Job Index....260
Searching for Job Openings....260
Browsing for Job Openings....263
Managing Job Openings....264
Understanding Job Opening Pages....264
Common Elements Used in This Section....265
Pages Used to Manage Job Openings....265
Reviewing Applicants Linked to Job Openings....265
Reviewing Job Opening Activity....267
Adding Notes to Job Openings....269
Adding Expenses to Job Opening....270
Reviewing Job Opening Details....270

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Chapter 13
Managing External Job Postings.....273
Searching for External Job Postings.....273
Understanding Job Postings Searches.....273
Prerequisites.....273
Pages Used to Search for Job Postings.....274
Defining Basic Criteria for Job Posting Searches.....274
Defining Advanced Keyword Searches.....275
Managing External Job Postings.....276
Understanding External Job Postings.....276
Pages Used to Manage External Job Postings.....276
Posting, Updating, and Unposting External Job Postings.....276
Reviewing External Job Posting Transaction History.....278
Reviewing the Integration Log.....279

Chapter 14
Managing Applicants.....281
Searching for Applicants.....281
Understanding the Build Applicant Index Process.....282
Understanding Applicant Searches.....282
Understanding Saved Searches.....282
Pages Used to Search for Applicants.....283
Building the Applicant Index.....283
Defining Applicant and Application and Resume Searches.....284
Defining Advanced Keyword Searches.....288
Searching the Internet.....292
Saving Applicant Searches.....293
Running Automatch Saved Searches.....293
Viewing Saved Searches.....294
Using the Job Search Agent.....294
Understanding the Job Agent Process.....294
Prerequisites.....295
Page Used to Run the Job Agent Process.....295
Running the Job Agent Application Engine Process.....295
Tracking Applicant Activity.....296
Understanding Applicant Tracking.....296
(JPN) Understanding How to Track Selectees for Japan.....296
Pages Used to Track Applicant Activity.....298
Reviewing Applicant Activity.....298

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Editing Disposition Details....301
Reviewing Applicant Expenses....302
Adding Applicant Expenses....303
Managing Contact Notes....304
Understanding Contact Notes and Attachments....304
Prerequisite....305
Page Used to Manage Contact Notes....305
Reviewing Contact Notes and Interested Parties....305
Adding Contact Notes....307
Viewing Proxy Details....308
Reviewing Applicant Data....309
Pages Used to Review Applicant Data....309
Viewing Applicant Data....309
Managing Applicant Lists....310
Understanding Applicant Lists....311
Pages Used to Manage Applicant Lists....311
Viewing Existing Applicant Lists....311
Creating Applicant Lists....312
Managing Applicant Lists....313
Editing Primary Applicant List Data....314
Adding Applicants to Applicant Lists....315
Creating Applicant Checklists....315
Understanding Checklists....315
Pages Used to Create Applicant Checklists....316
Creating Applicant Checklists....316
Forwarding Applicants....317
Understanding Applicant Forwarding....317
Pages Used to Forward Applicants....317
Forwarding Applicants....317
Finding Email Addresses....319
Sending Correspondences....320
Understanding Communication Methods....320
Pages Used to Send Correspondences....322
Sending Emails....322
Generating Recruitment Letters....323
Linking Applicants to Job Openings....324
Understanding How to Link Applicants to Job Openings....324
Prerequisites....324
Pages Used to Link Applicants to Job Openings....325
Linking Applicants to Job Openings....325

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Changing Applicant Statuses....326
Pages Used to Change Applicant Statuses....326
Changing Applicant Statuses....326
Adding Persons of Interest....326
Understanding Persons of Interest....327
Pages Used to Add Persons of Interest....328
Selecting Person of Interest Types and Adding Persons of Interest....328
Viewing Search/Match Results....329
Processing Duplicate Applicants....329
Understanding Duplicate Applicant Processing....329
Pages Used to Process Duplicate Applicants....332
Initiating Duplicate Applicant Process....332
Defining Search Criteria....334
Merging Duplicate Applicant Records....335
Merging Applicants....337
Generating Recruitment Related Reports....338
Pages Used to Generate Recruitment Related Reports....339

Chapter 15
Managing Resumes....341
Understanding Resume Management....341
Channels....341
Understanding the Resume Extraction Process....343
Understanding Resume Statuses....344
Loading Resumes....346
Understanding the Resume Load Process (HRS_RESLOAD)....346
Prerequisites....347
Page Used to Load Resumes....348
Loading Resumes....348
Managing Resumes....351
Understanding Resume Management....351
Prerequisite....351
Pages Used to Manage Resumes....352
Managing Resumes....352
Viewing Details for Resumes....354

Chapter 16
Managing Employee Referral Programs....357

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Understanding the Employee Referral Program Process.....357
Setting Up Employee Referral Programs.....357
Understanding How to Set Up Employee Referral Programs.....358
Pages Used to Set Up Employee Referral Programs.....359
Naming Employee Eligibility Rules.....360
Creating SQL Statements for Employee Eligibility Rules.....361
Naming Award Category Rules.....362
Creating SQL Statements for Award Category Rules.....363
Defining Award Schedules.....364
Defining Employee Referral Programs.....365
Defining Additional Criteria.....366
Selecting Employee Eligibility and Award Category Rules.....367
Submitting Referrals.....369
Understanding Employee and Applicant Referrals.....369
Pages Used to Submit, Confirm, and Review Referrals.....371
Processing Employee Referrals.....372
Understanding the Employee Referral Program Process.....372
Understanding Payment Statuses.....374
Page Used to Process Eligibility and Awards.....376
Processing Eligibility and Awards.....376
Reviewing and Overriding Referral Awards.....377
Understanding Referral Overrides.....378
Pages Used to View and Override Referral Awards.....379
Viewing Referral Summary Information.....379
Viewing and Overriding Employee Eligibility.....380
Viewing Awards.....381
Overriding Award Details.....382
Viewing Eligibility by Application.....384
Viewing and Overriding Duplicate Referrals.....385
Approving and Paying Referral Awards.....387
Understanding Award Approvals.....387
Understanding Paying Awards.....387
Pages Used to Approve and Pay Referral Awards.....390
Approving Referral Awards.....390
Submitting Awards.....391
Viewing Rejected Awards.....391
Editing Rejected Awards.....392
Managing Hot Jobs.....392
Understanding Hot Jobs.....393
Pages Used to Manage Hot Jobs.....394

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Naming and Describing Hot Job Categories....394
Creating SQL Statements to Define Job Opening Selection Criteria....395
Removing Selected Job Openings from the Hot Job Category....396
Setting Up Award Schedules....396
View Hot Job History....396

Appendix A
Delivered Workflows for Talent Acquisition Manager....399
Delivered Workflows for Talent Acquisition Manager....399
Job Offer Approval....399
Job Offer Approved....400
Job Offer Deny....400
Job Offer Error....401
Job Offer Escalation....401
Job Offer Review....402
Job Offer Termination....402
Job Opening Approval....403
Job Opening Approved....403
Job Opening Deny....404
Job Opening Error....404
Job Opening Escalation....405
Job Opening Review....405
Job Opening Termination....406
Delivered Notification Templates....406

Appendix B
Delivered Permission Lists and Roles for Talent Acquisition Manager....409
Delivered Permission Lists and Roles....409

Appendix C
PeopleSoft Talent Acquisition Manager Reports....413
Talent Acquisition Manager Reports: A to Z....413

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Glossary of PeopleSoft Enterprise Terms.....417

Index 443

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About This PeopleBook Preface

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

This preface discusses:

- PeopleSoft Enterprise application prerequisites.
- 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 elements, such as fields and check boxes, that require additional explanation. If an 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 Enterprise applications are defined in this preface.

PeopleSoft Enterprise 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 Enterprise applications.

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

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft Enterprise menus, pages, 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 Enterprise applications most effectively.

Application Fundamentals

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

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 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.

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The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft Enterprise applications. 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.
- Download and order printed documentation.

Obtaining Documentation Updates

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

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

See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

Downloading and Ordering Printed Documentation

In addition to the complete line of documentation that is delivered on your PeopleBook CD-ROM, Oracle makes PeopleSoft Enterprise documentation available to you via Oracle's website. You can:

- Download PDF files.
- Order printed, bound volumes.

Downloading PDF Files

You can download PDF versions of PeopleSoft Enterprise documentation online via the Oracle Technology Network. Oracle makes these PDF files available online for each major release shortly after the software is shipped.

See Oracle Technology Network, http://www.oracle.com/technology/documentation/psftent.html.

Ordering Printed, Bound Volumes

You can order printed, bound volumes of selected documentation via the Oracle Store.

See Oracle Store, http://oraclestore.oracle.com/OA_HTML/ibeCCtpSctDspRte.jsp?section=14021

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Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

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

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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 Enterprise 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.
“ ” (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 (|).

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Typographical Convention or Visual Cue	Description
[ ] (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 Enterprise 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.

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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 Oracle reference and training materials. Please send your suggestions to your product line documentation manager at Oracle Corporation, 500 Oracle Parkway, Redwood Shores, CA 94065, U.S.A. Or email us at appsdoc@us.oracle.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.

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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.

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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 9.0 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 9.0 Application Fundamentals PeopleBook.*

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Understanding HRMS"

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.

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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.

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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.

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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

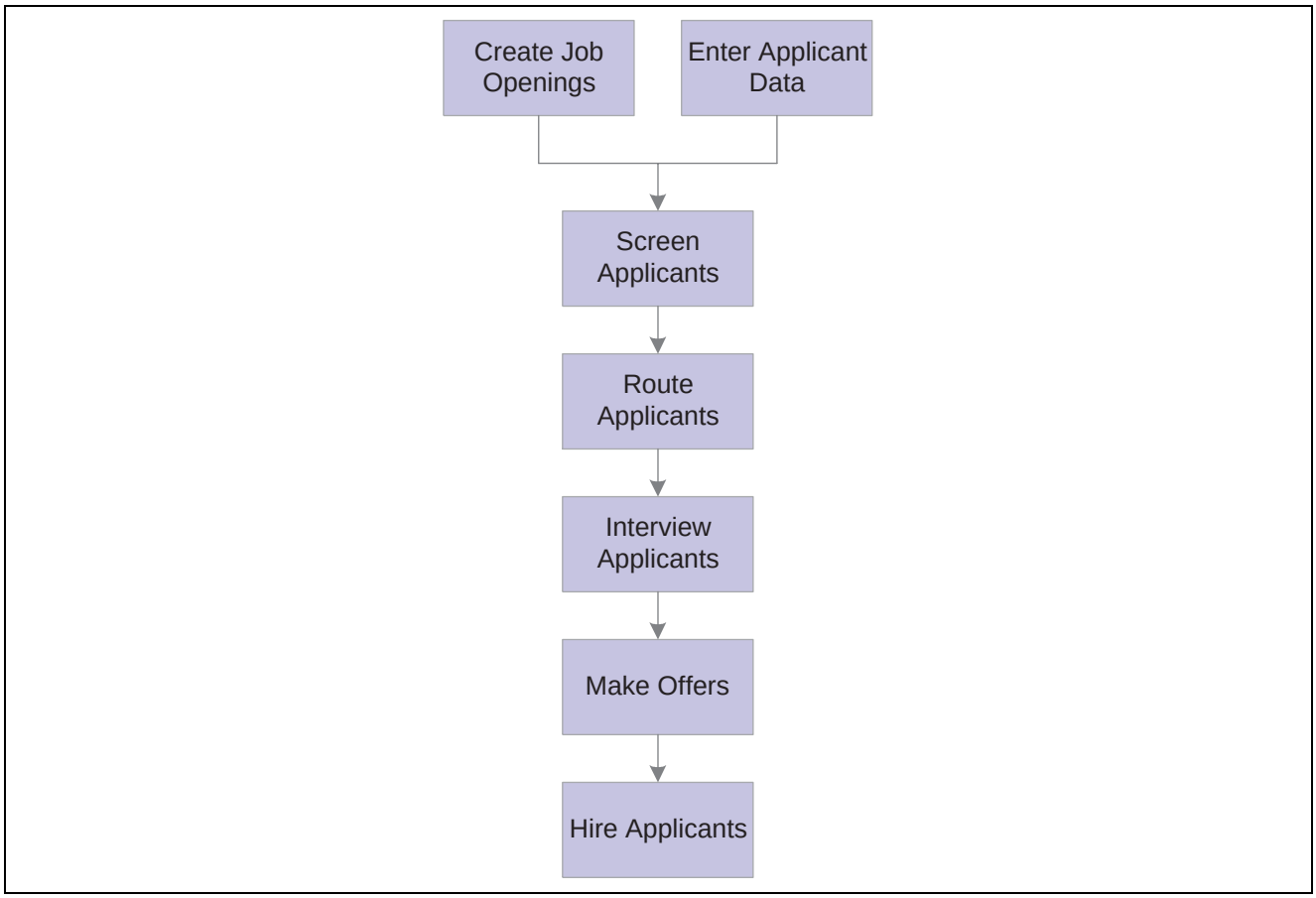
Talent Acquisition Manager is a complete, integrated system that enables organizations to effectively manage workforce acquisition across all employment categories. Whether you have a few resumes to fill hard-to-find positions or you have plenty of resumes but top candidates are scarce, Talent Acquisition 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 recruitment process flow used by Talent Acquisition Manager recruitment :

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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 9.0 Application Fundamentals PeopleBook*, "Working with Common Components," Configuring the Text Catalog.
- Secure access to data.

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

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

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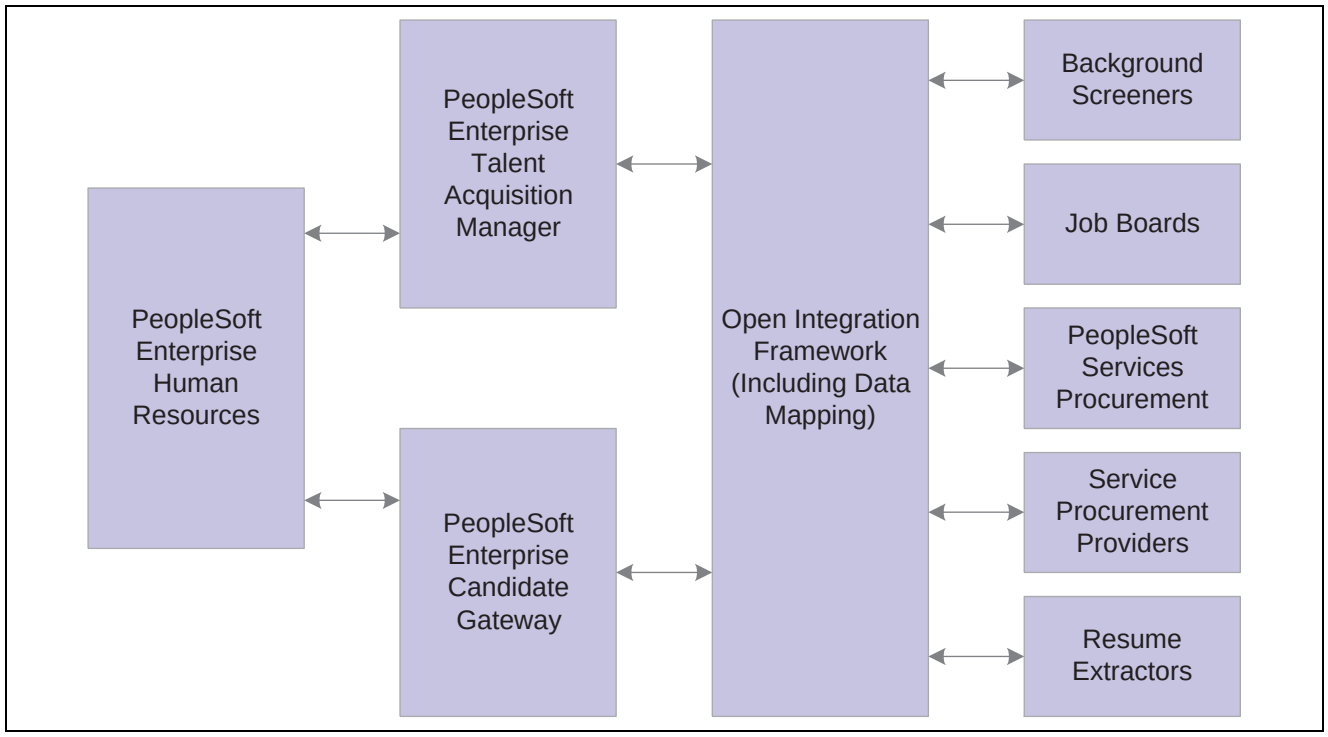
To accommodate people that might need to approve job openings or job offers that are outside the business unit, department, or company that is tied to a job opening, Talent Acquisition Manager uses the Recruiting Row Level Security component to give them access.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up and Administering HRMS Security," Activating Additional Security for Recruiting Solutions.

See Chapter 6, "Creating Job Openings," page 121.

Talent Acquisition Manager Integrations

Talent Acquisition Manager integrates with these PeopleSoft applications:



Talent Acquisition Manager integrations

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.

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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_CI	See Chapter 2, "Setting Up Recruiting Processes," Setting Up Job Openings, page 15.
HRS_ QSTN_DEF	HRS_ QSTN_DEF_CI	See Chapter 2, "Setting Up Recruiting Processes," Setting Up Job Openings, page 15.
HRS_LOCATION	HRS_LOCATION_CI	See Chapter 2, "Setting Up Recruiting Processes," Setting Up Job Openings, page 15.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Understanding HRMS"

Enterprise PeopleTools PeopleBook: PeopleSoft Setup Manager

Enterprise PeopleTools PeopleBook: PeopleSoft Component Interfaces

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CHAPTER 2

Setting Up Recruiting Processes

This chapter provides an overview of implementing recruiting processes and 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.

Understanding Recruiting Processes Implementation

To implement recruiting processes, you must set up the following Human Resources tables:

- Foundation Tables
- Common Definitions
- Product Related

Foundation Tables

Recruiting Solutions uses Human Resources Management (HR) tables to extract all the basic information about your company that will be used during recruiting processing. You must set up these tables before you establish any other tables in the system. The HR tables and data used by Recruiting Solutions include:

- Address information
- Business units
- Company
- Citizen Status
- Currency codes
- Departments

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- Establishments
- Job Codes
- Job Families
- Locations
- Name information
- National IDs

Common Definitions

Recruiting Solutions uses the following common definition tables:

- Approvals
- Text Catalog

Product Related

Recruiting Solutions uses the following product related tables:

- Profile Management
- Organizational Development
- Contract Administration
- Labor Administration

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.

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

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up and Installing PeopleSoft HRMS," Selecting PeopleSoft Applications for Your Installation.

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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.

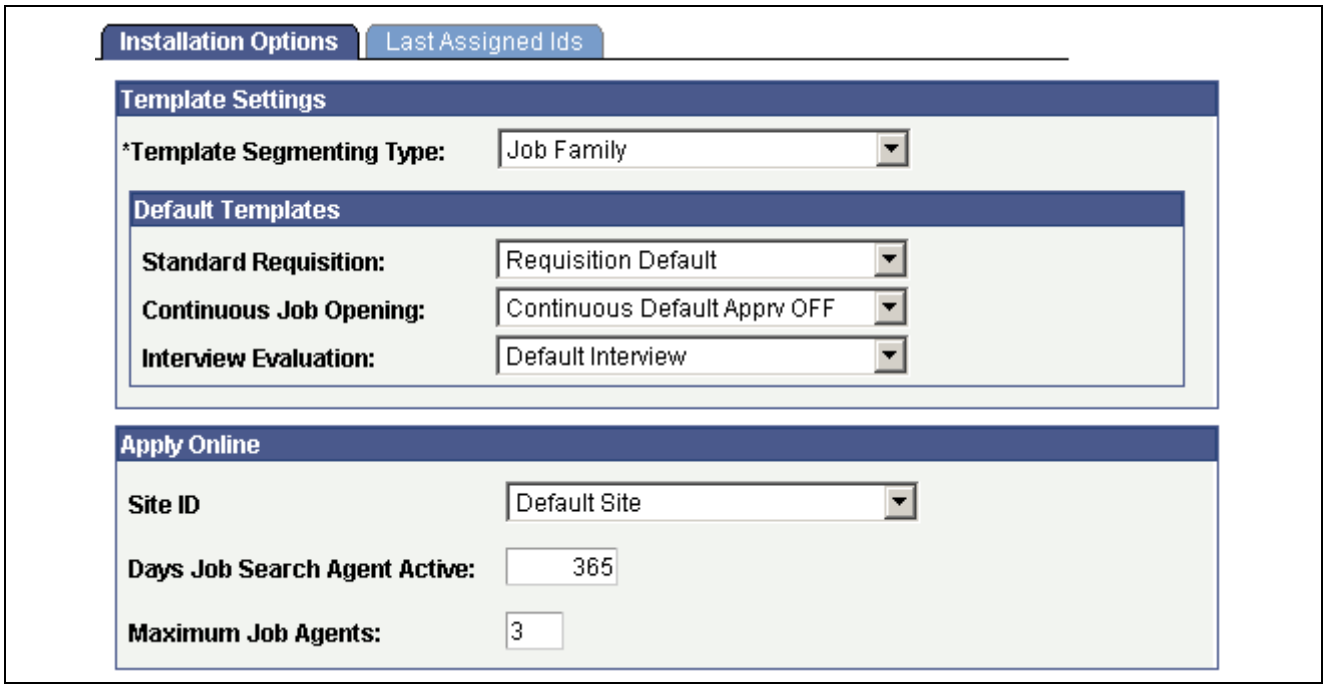
Pages Used to Set Up Talent Acquisition Manager Implementation Defaults

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.

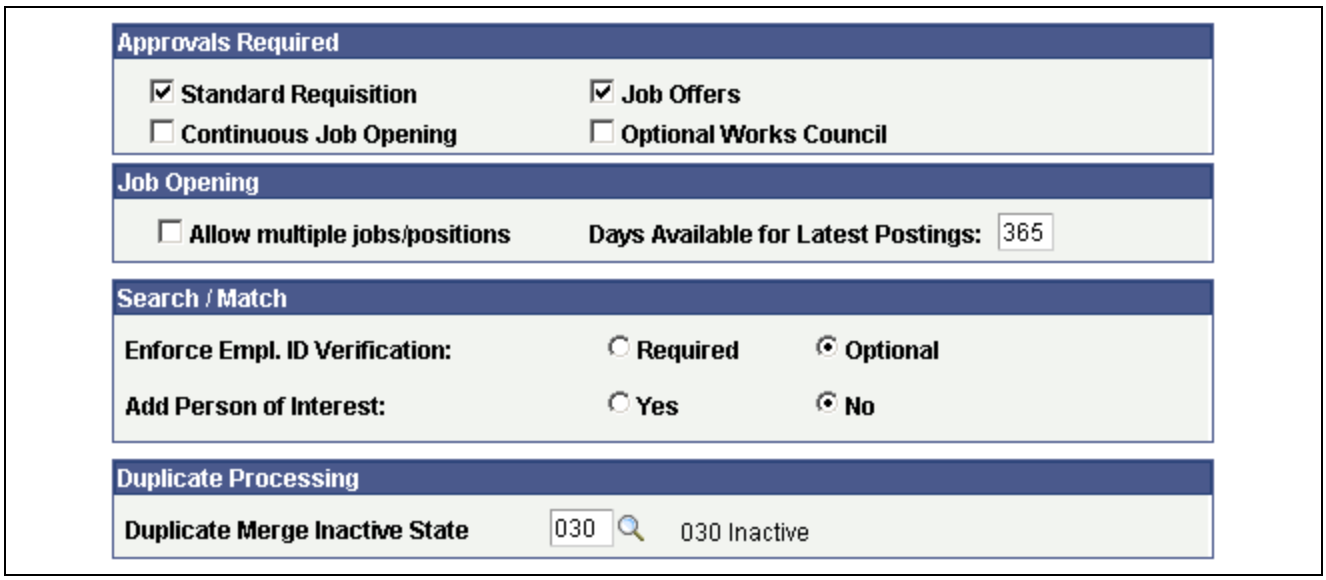
Defining Recruiting Installation Defaults

Access the Recruiting Installation - Installation Options page.

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Recruiting Installation - Installation Options page (1 of 2)



Recruiting Installation - Installation Options page (2 of 2)

Template Settings

Template Segmenting Type Select the segmenting type. Valid options are:

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

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- *Salary Grade*

The segmenting type and the segmenting values entered on the Segmentation Values page are used by the Create New Job Opening component to identify which recruitment template to assign to new job openings and to determine which fields to display on the Enter Primary Job Opening Information page.

See Chapter 6, "Creating Job Openings," Creating Job Openings, page 124.

Default Templates

Standard Requisition Select the default job opening template for a standard requisition.

When creating new job openings, the system tries to identify which recruitment template to associate with the job opening. If the system is unable to identify a recruitment template, the system assign the template entered here.

Continuous Job Opening Select the default job opening template for a continuous job opening.

When creating new job openings, the system tries to identify which recruitment template to associate with the job opening. If the system is unable to identify a recruitment template, the system assign the template entered here.

Interview Evaluation Template Select the default interview evaluation template.

The system uses this template when an applicant is being evaluated and is not linked to any job opening.

Apply Online

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

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.

See Chapter 2, "Setting Up Recruiting Processes," Setting Up Sites, page 12.

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

This group box is used to activate the two approval processes, JobOpening and JobOffer, used by Talent Acquisition Manager. Approvals are created using the Approval Workflow Engine (AWE) framework.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up and Working with Approvals".

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Standard Requisition Select this check box to activate approvals when creating job openings with a type of standard requisition.

Continuous Job Opening Select this check box to activate approvals when creating job openings with a type of continuous job opening.

Job Offers Select this check box to activate approvals when creating a job offer.

Optional Works Council Select this check box to activate approvals when creating job offers requiring works council approval.

When you select this option, the Works Council Information section appears as an option in the Job Opening Template and Job Opening pages.

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

Job Opening

Allow multiple jobs/positions Select this check box if you want to allow multiple jobs or positions linked to one job opening.

When you select this option, the Job Code Information group box appears on the Job Opening page.

Days Available for Latest Posting Enter the number of days that a job posting will be displayed in the Latest Job Postings column on the Careers page.

The system will add this number to the job opening's posting date. If the system date is greater than the calculated date, the job opening will not display.

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.

Duplicate Processing

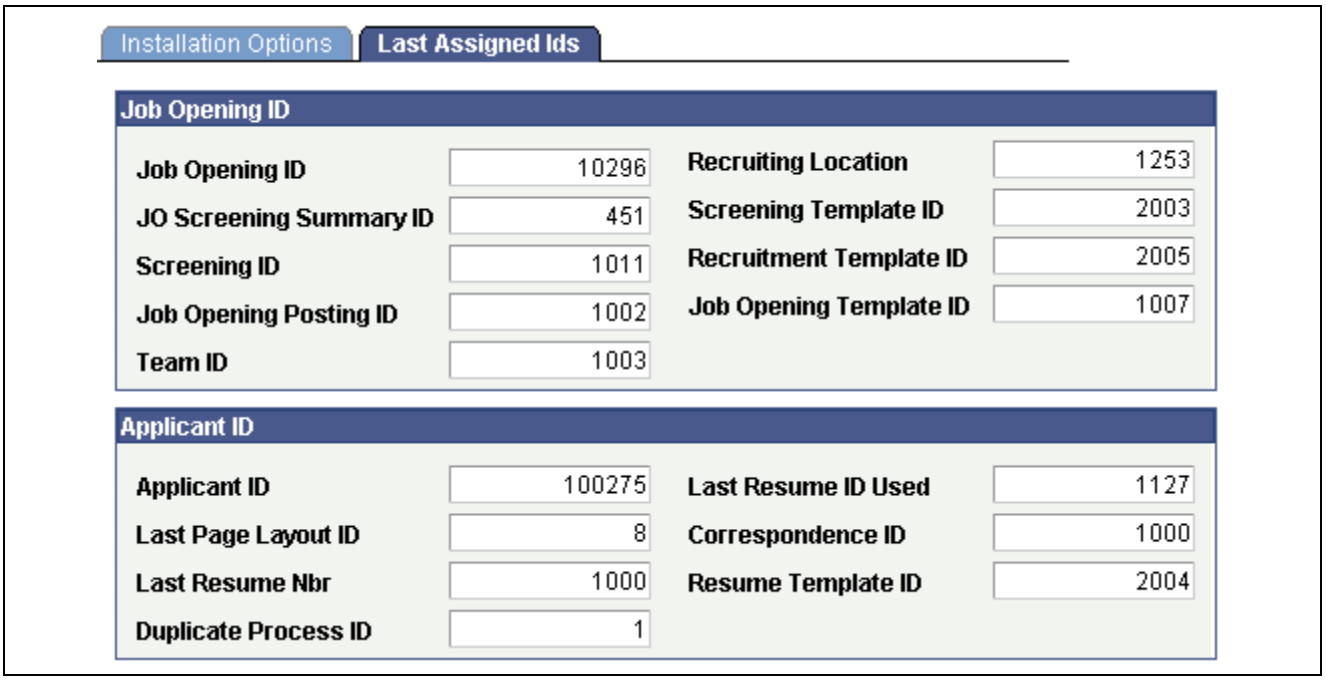
Duplicate Merge Inactive State Select the status to which the system will set the applicant status when a duplicate applicants is found.

The system uses this field to set the applicant status when they are found to be a duplicate applicant and is the target-merged applicant.

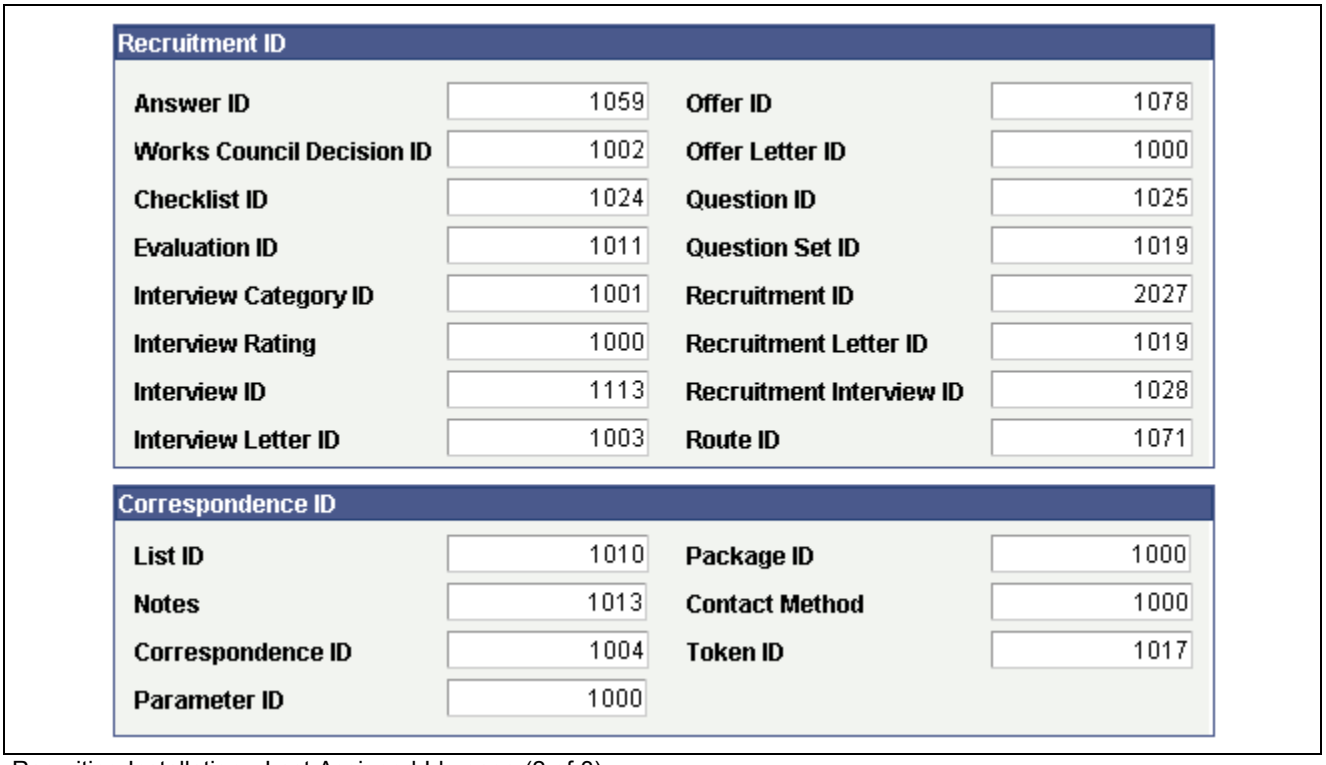
Specifying Starting Numbers for System-Assigned Numbers

Access the Recruiting Installation - Last Assigned Ids page.

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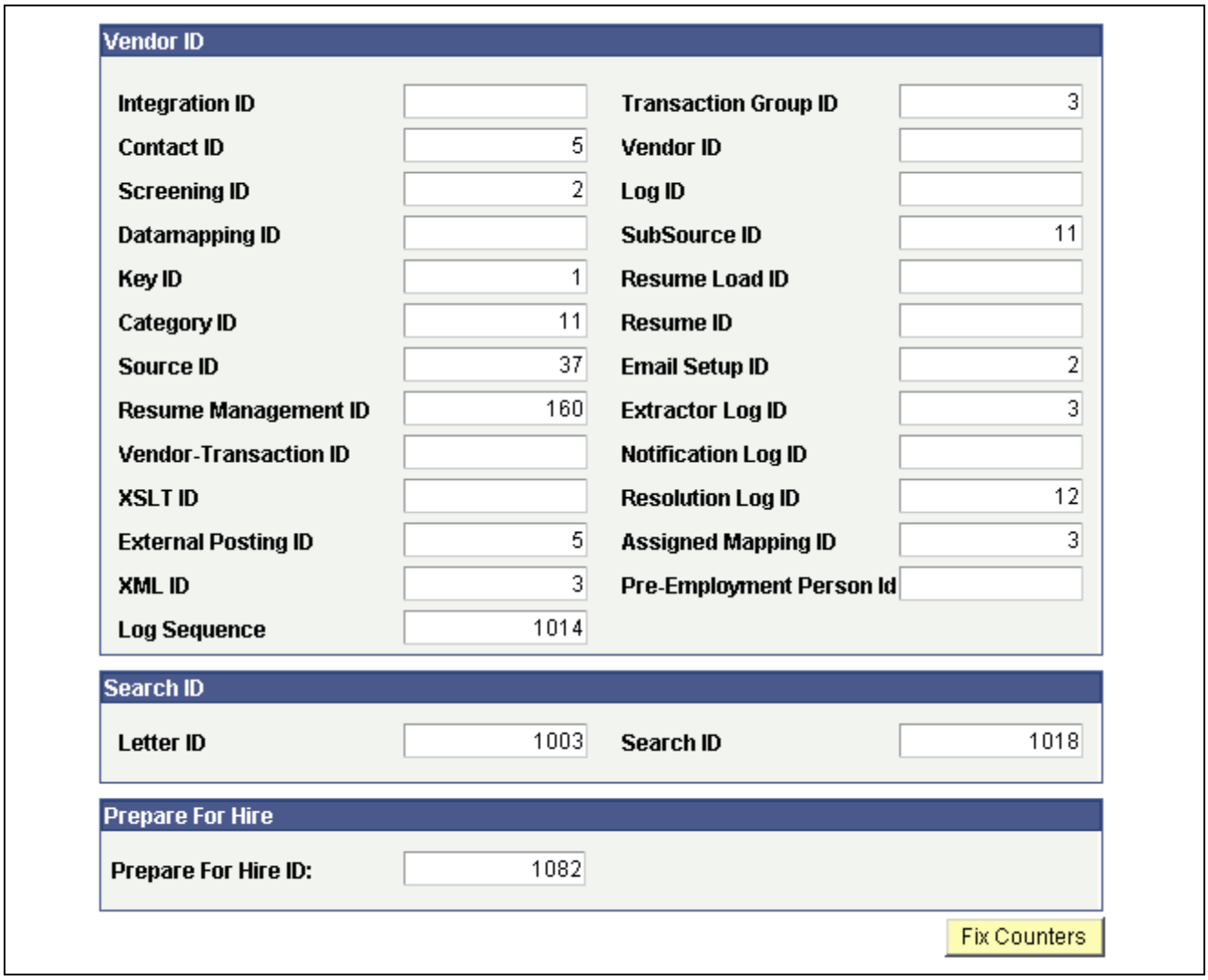


Recruiting Installation - Last Assigned Ids page (1 of 3)



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

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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 Sites

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

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

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Understanding Sites

Candidate Gateway enables organizations to manage the look and feel of the application for each of their career sites by creating a site ID for each site. Site IDs define the details of a Recruiting Solutions online application site, including the jobs that applicants can access through the site.

The system requires that you associate a resume template to each site. If there is no resume template associated to the job opening to which an applicant applies online, or if the applicant applies online without applying to a specific job opening, the system uses the resume template that you assign to the site.

After you set up sites, specify a default site ID on the Recruiting Installation - Installation Options page. The system uses the default site ID when it cannot determine a specific site.

You can set up an unlimited number of sites for an organization. For example, an organization can have a unique site for each business unit in the organization, and applicants accessing those sites can have access to job openings for each specific business unit. Sites are either for internal applicants that are employees, internal applicants that are non-employees, or external applicants. You can also utilize the text catalog to target different audiences. For example, you can have different text on the pages for internal and external applicants.

See ““Recruiting Solutions Using Sites Red Paper,” http://www.peoplesoft.com/corp/en/iou/red_papers /index.jsp”

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “Working with Common Components,” Configuring the Text Catalog

Prerequisites

Before you can set up sites, you must:

- Set up row security.

  See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, “Setting Up and Administering HRMS Security”.

- Set up resume templates.

  See Chapter 3, “Setting Up Recruiting Templates,” Setting Up Resume Templates, page 44.

- (Optional) Set up resume extractor vendors.

  See Chapter 5, “Setting Up Third Party Integrations,” Setting Up Recruiting Vendors, page 88.

- Set up portal definitions.

  See *Enterprise PeopleTools PeopleBook: Internet Technology, “Administering Portals”*

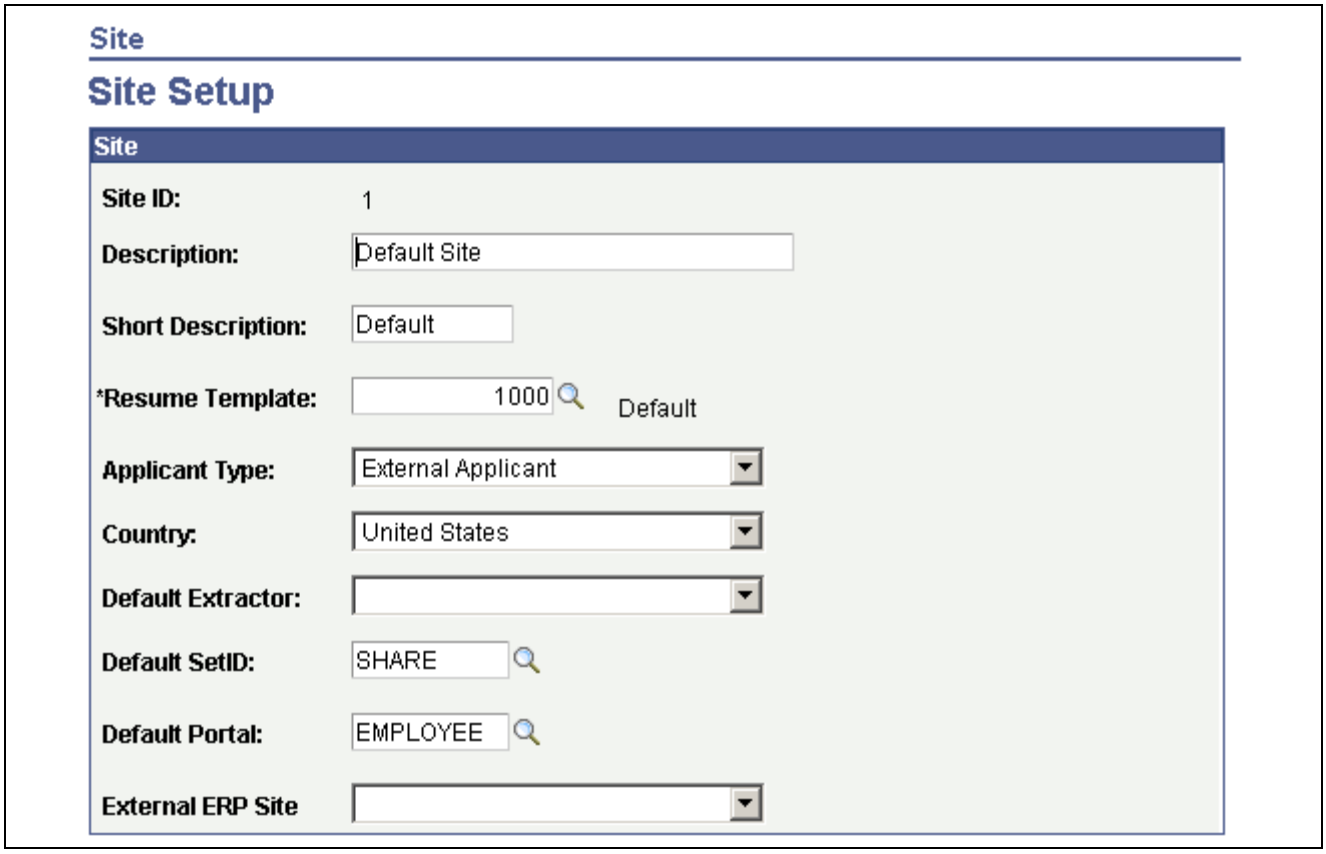
Pages Used to Set Up Sites

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

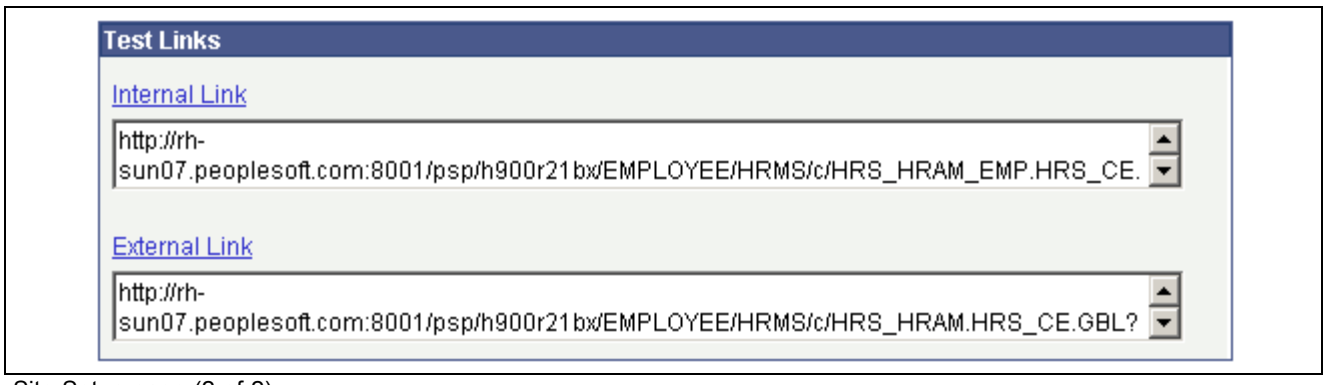
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Setting Up Sites

Access the Site Setup page.



Site Setup page (1 of 2)



Site Setup page (2 of 2)

Site ID Displays the ID that you entered when you added a new site ID value. This is used as a parameter on the URL to direct users to the correct site.

Resume Template ID Select the resume template that you want to associate with this site. If the job opening to which the applicant is applying is associated with a resume template, the system uses that resume template. If the job opening to which the applicant is applying is not associated with a resume template, or if the applicant is not applying to a specific job opening, the system uses the resume template that you specify here. Define resume templates by using the Setup Resume Template component.

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Applicant Type Select the type of applicant that uses this site. Values are: *Employee, External Applicant,* and *Non-Employee.* The system assigns the applicant type that you select here to all applicants that apply through this site. For example, if you select *External Applicant* for site B, the system adds all applicants that apply through site B to the system as external applicants.

This applicant type appears on several pages in Talent Acquisition Manager. For example, you can search for applicants based on applicant type by using the Find Applicants (HRS_REC_SCHAPP) component.

Country Select a country to use for resume extraction. Some resume extractors require a country to format names and addresses. Define countries by using the Country Table (COUNTRY_TABLE) component.

Default Extractor Select a default extractor. The system uses the resume extractor that you specify here to extract information from applicant's resumes. If you do not select a value, applicants can attach resumes but the system cannot extract information from the resumes. Set up resume extractors by using the Setup Vendor (HRS_VENDOR_SETUP) component.

Default SetID Select a default setID. The system uses this setID to determine the appropriate information to present to applicants that access the system through this site. Define setIDs on the TableSet Control page.

Default Portal Select the default portal. The system uses this portal, and the node associated with the portal, to define the URL for redirection to this site from sources such as job board providers. Define portals on the Portal Definitions page.

External ERP Site Identify the location where external candidates are directed to view and update information when their application is submitted through an employee referral or automatch search.

Test Links The system uses the specified test links to verify the layout of a particular site and to easily retrieve the full URL path. The separate URLs, Internal Link and External Link, allow the site to be viewed from either an internal employee's perspective or as an external applicant, respectively.

Setting Up Job Openings

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

This section discusses how to:

- Define recruiting locations.
- Define recruiter roles.
- Create teams.

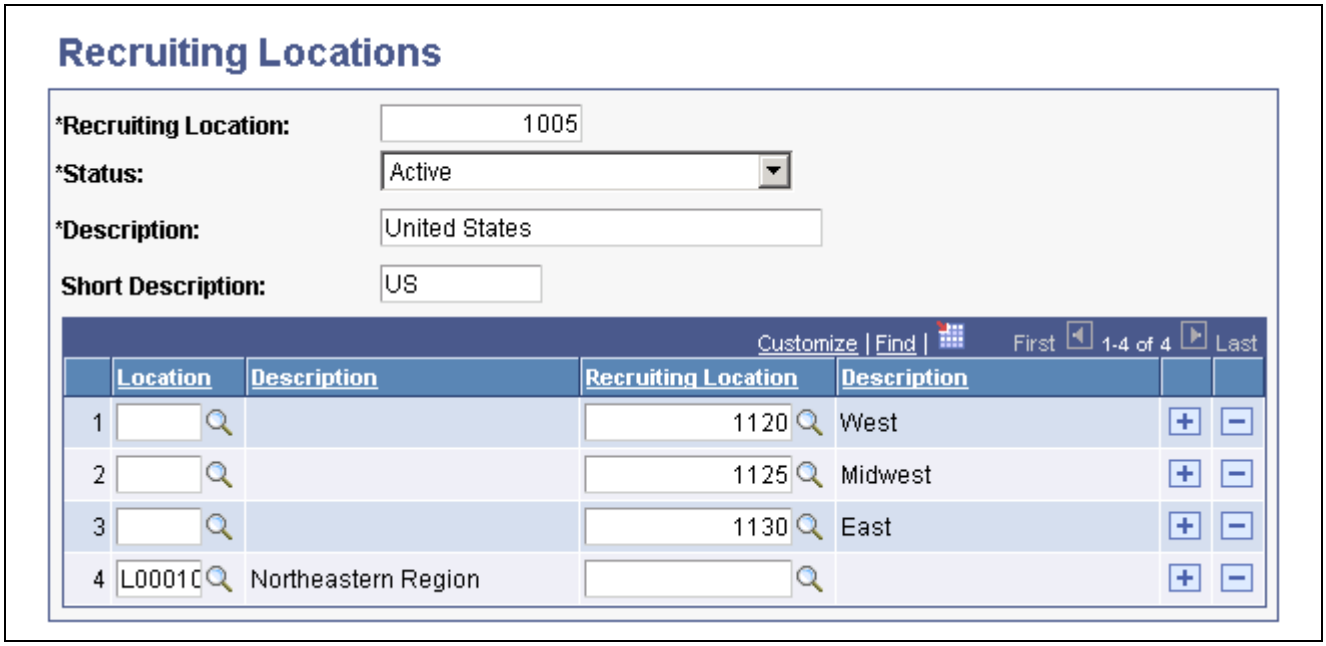
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Pages Used to Set Up Job Openings

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.
Teams	HRS_TEAM	Recruiting, Administration, Teams, Teams	Create and maintain teams.

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.

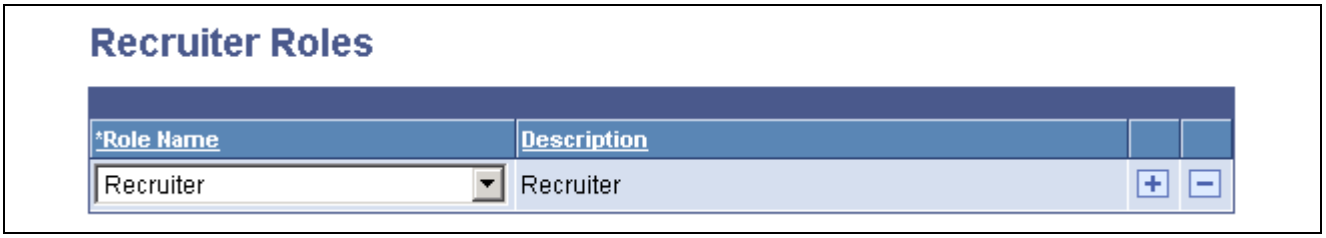
See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up Organization Foundation Tables," Establishing Locations.

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

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Defining Recruiter Roles

Access the Recruiter Roles page.

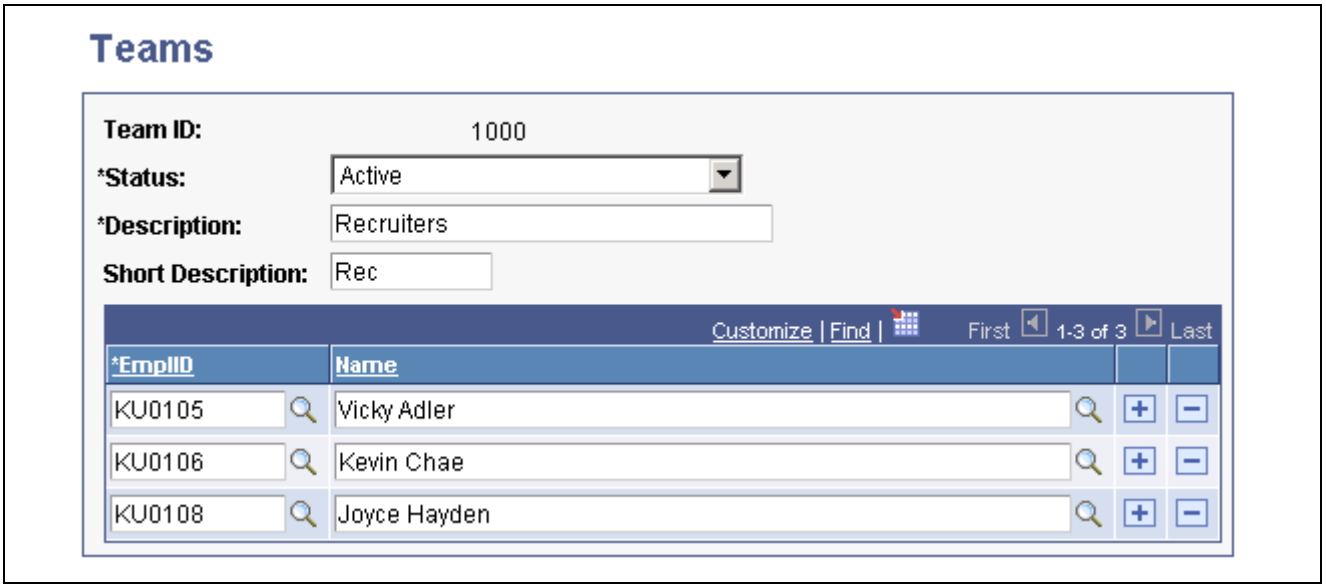


Recruiter Roles page

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.

Creating Teams

Access the Teams page.



Teams page

Teams are used to associate a group of recruiters, hiring manager, interviewers, or interested parties to a job opening. When you create a job opening, you identify the recruiter, hiring manager, interviewers, and interested parties for the job opening. If you have more than one person in each of these roles, creating teams can save you the time of individually entering each one.

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 an individual from a job opening at any time and that individual no longer has access to the 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.

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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.

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

Job posting are made up of posting descriptions and items from the posting description library. When you create a job opening, you select from these components to build the text that makes up job posting that is posting to a job board or intranet site.

Posting Descriptions

A posting description is a category by which the job posting can be organized. These categories can be put together to form the structure of the job posting description. For example, you may want 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.

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- R - Responsibilities.
- T - How CTAP &/or ICTAP May Apply.
- V - How to Claim Veterans Preference.
- W - Who May Apply.

Posting Descriptions Library

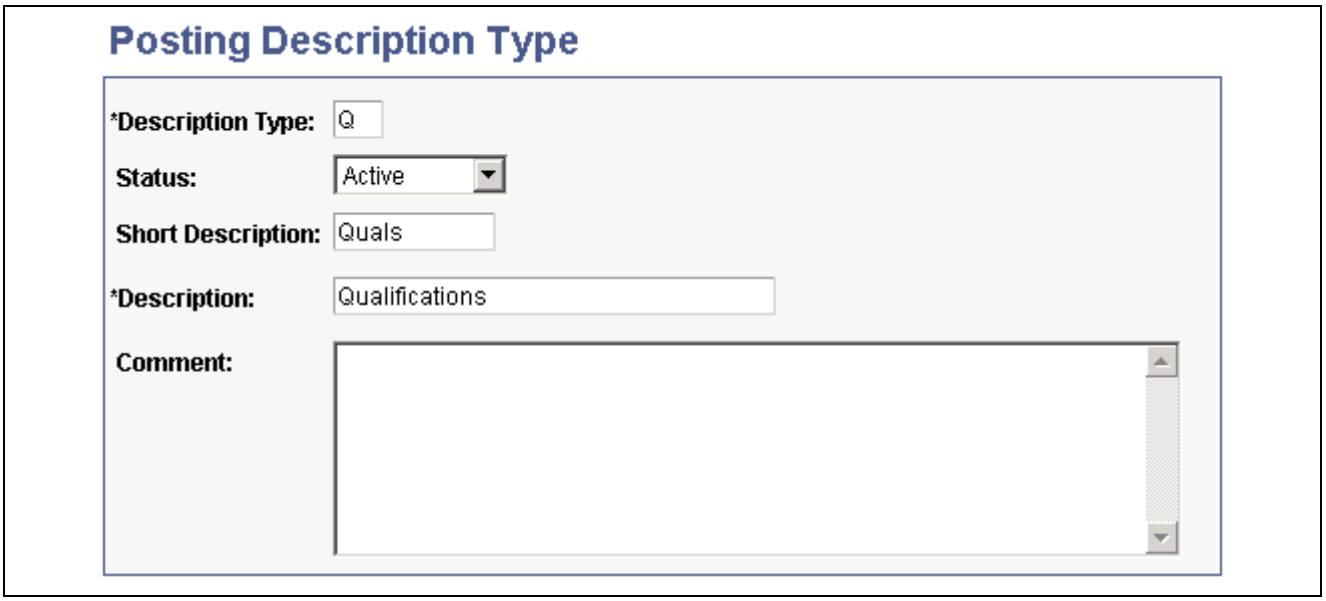
The posting descriptions library provides the content that will go into each of the posting description types. You can enter the content at the time you create a job opening, but using the posting description library enables you to standardized the content and help your organization provide some standardization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

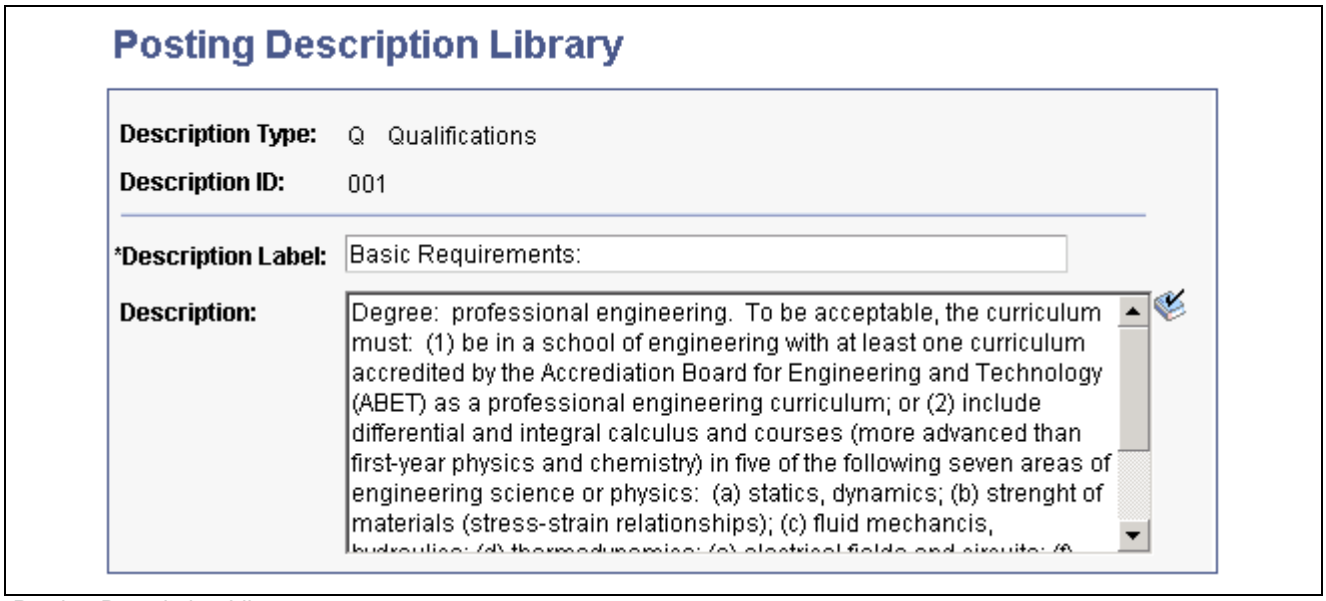


Posting Description Type page

Creating Posting Descriptions

Access the Posting Description Library page.

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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

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 the following attachment types:

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

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See Also

PeopleSoft Enterprise Candidate Gateway 9.0 PeopleBook, "Using Candidate Gateway," Submitting Attachments

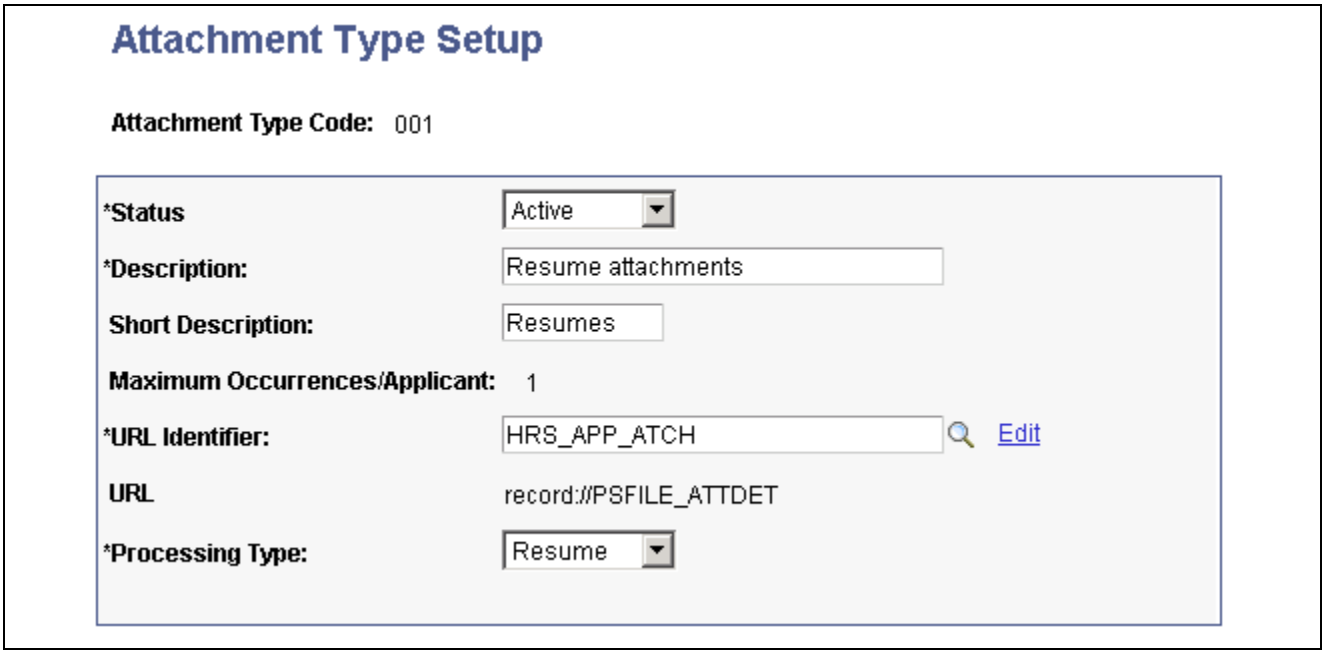
PeopleSoft Enterprise Candidate Gateway 9.0 PeopleBook, "Using Candidate Gateway," Entering References

Page Used to Set Up Applications

Page Name	Object Name	Navigation	Usage
pen, 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.

Edit Click the link to display the URL Maintenance page, which you can use to define the URL address that is used to store the attachments.

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

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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

Reference

Resume

Setting Up Applicant Communications

To set up applicant communications, use the Contact Method Types (HRS_CNTCT_MTHD) component.

This section discusses how to define contact method types.

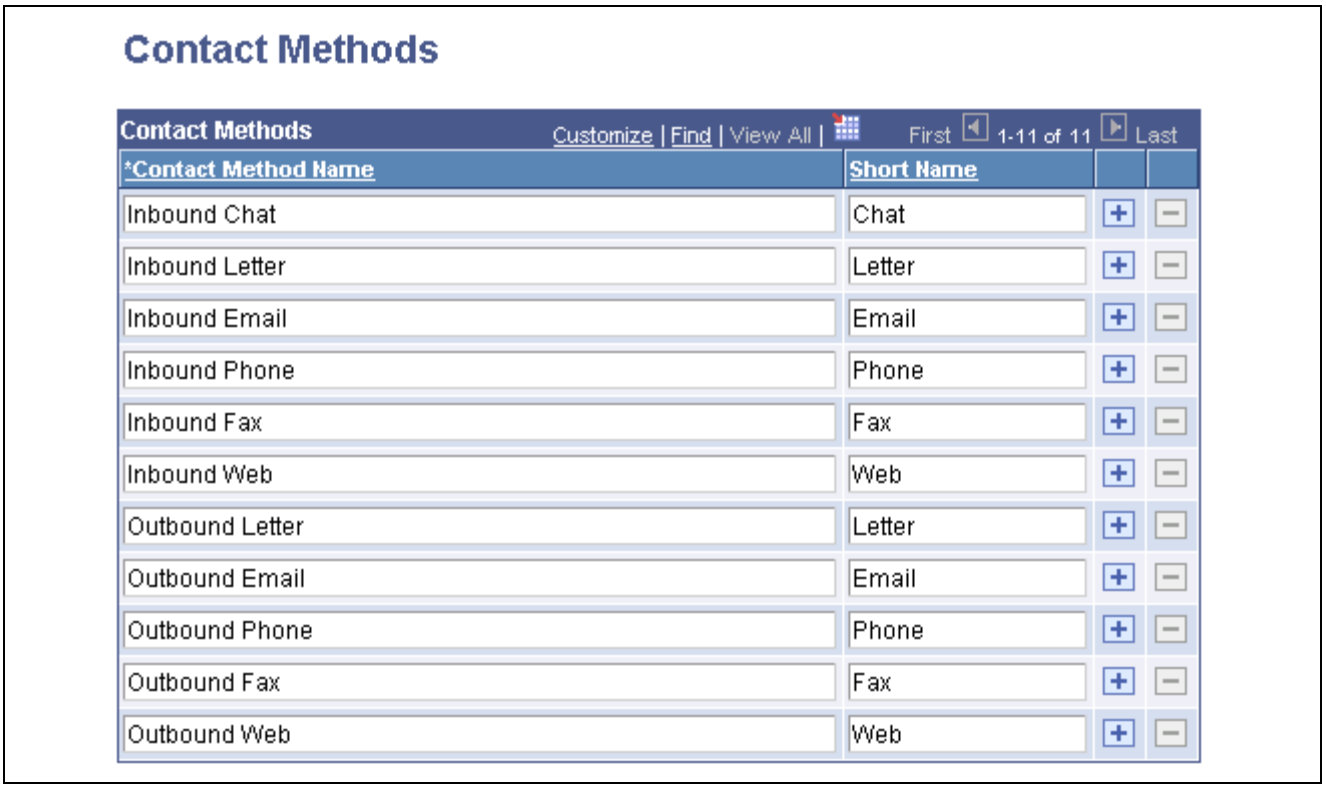
Pages Used to Set Up Applicant Communications

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.

Defining Contact Method Types

Access the Contact Methods page.

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Contact Methods page

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

Working with XML Publisher

Recruiting Solutions uses Oracle's XML Publisher to generate recruitment letters. There are three types of recruitment letters:

- Applicant
- Interview
- Offer

The XML Publisher is a template-based reporting solution that separates the data extraction process from the report layout and allows the reuse of extracted application data into multiple report layouts. Letters are generated when:

- New applicants are added using the Add New Applicant page.
- Existing application are updated.
- Interviews are scheduled using the Interview Schedule page.
- Offers are defined using the Prepare Offer page.

These generated letters can be printed immediately from the originating pages or at a later date using the Print Recruitment Letters process.

Talent Acquisition manager delivers the following recruitment letter templates:

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Template ID	Report Definition	Template File	Purpose
HRS_APP_LETTER_ACQ	HRS_APP_LET	LTRACQxml.rtf	Acknowledges receipt of applicant's resume.
HRS_APP_LETTER_ANO	HRS_APP_LET	Ltranoxml.rtf	Notifies applicant of no current job openings.
HRS_APP_LETTER_CR1	HRS_APP_LET	LTRCR1xml.rtf	Thanks applicant for interest in company and that their qualifications are being reviewed.
HRS_APP_LETTER_IR	HRS_APP_LET	LTRIR.rtf	Interview rejection letter.
HRS_APP_LETTER_LAQ	HRS_APP_LET	Ltrlaqxml.rtf	Thanks applicant for interest in company and that their qualifications are being reviewed.
HRS_INT_LETTER_IS1	HRS_INT_LET	LTRIS1xml.rtf	Notifies applicant of scheduled interview date and time.
HRS_INT_LETTER_IS2	HRS_INT_LET	LTRIS2xml.rtf	Notifies applicant of scheduled interview date and time.
HRS_INT_LETTER_IS3	HRS_INT_LET	LTRIS3xml.rtf	Notifies applicant of scheduled interview date and time.
HRS_OFF_LETTER_OF1	HRS_OFF_LET	LTROF1xml.rtf	Notifies applicant of offer and compensation package.
HRS_OFF_LETTER_OF2	HRS_OFF_LET	LTROF2xml.rtf	Notifies applicant of offer and compensation package.

See Also

Enterprise PeopleTools PeopleBook: XML Publisher for PeopleSoft Enterprise

Chapter 9, "Interviewing Applicants," page 217

Chapter 7, "Entering Applicants," page 163

Chapter 10, "Making Job Offers," page 233

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:

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

Understanding Questionnaire Setup

Many organizations use 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 can be comprised of one or more question set definitions. Question set definitions are comprised one or more question definitions. Question definitions are comprised of one or more answer definitions.

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.
4. Add a section for online questionnaire to the resume template.
5. Add a section for screening questions to the job opening template.

When you create a job opening, you can link questions or question sets to the job opening.

If you plan to use these questions as part of the screening process, remember that only applicants that apply online have access to the questions. Applicants that send their resumes through a job board or email address, or that are entered by a recruiter or administrator using the Add New Applicant component, cannot answer these questions. When you run screening, you may not get the results you were expecting.

See Chapter 3, “Setting Up Recruiting Templates,” Setting Up Job Opening Templates, page 50.

See Chapter 6, “Creating Job Openings,” Creating Job Openings, page 124.

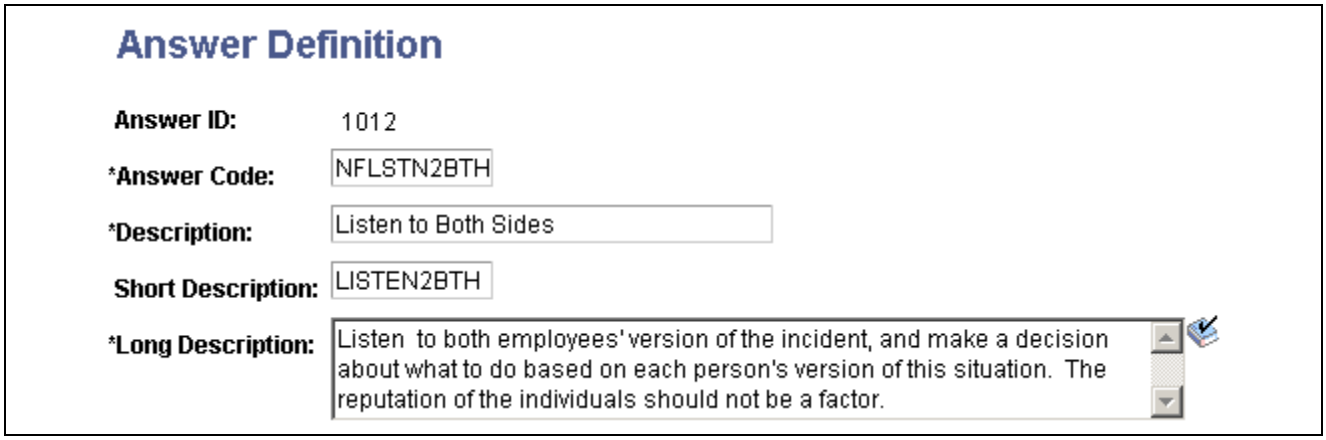
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Pages Used to Set Up Questionnaires

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.

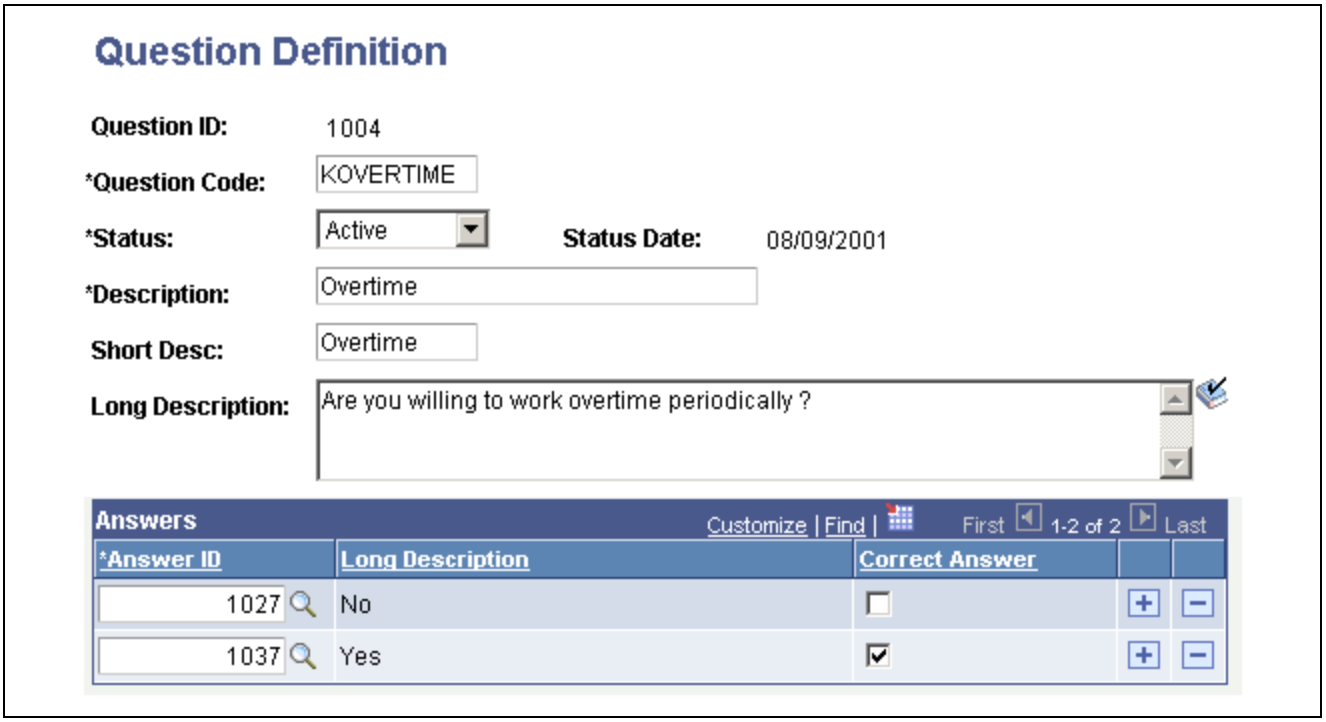
Description Enter a description for this answer. This description appears in conjunction with the answer code.

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.

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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.

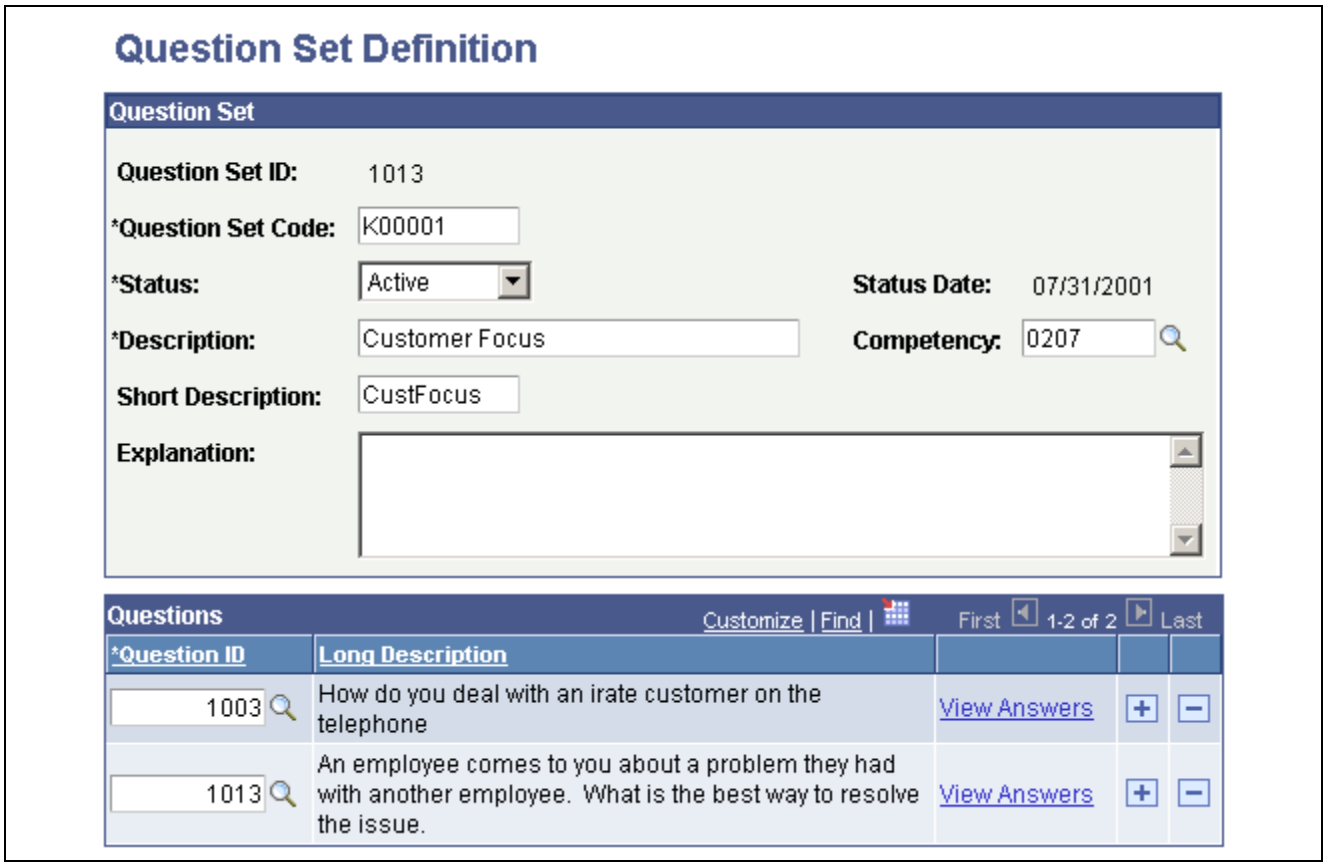
Long Description Displays the long description for the selected answer ID.

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.

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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.

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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 55.
3. Use the Create New Job Opening component to assign specific screening criteria to each screening level.

   See Chapter 6, “Creating Job Openings,” Adding Screening Criteria to Screening Levels, page 145.

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:

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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:

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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

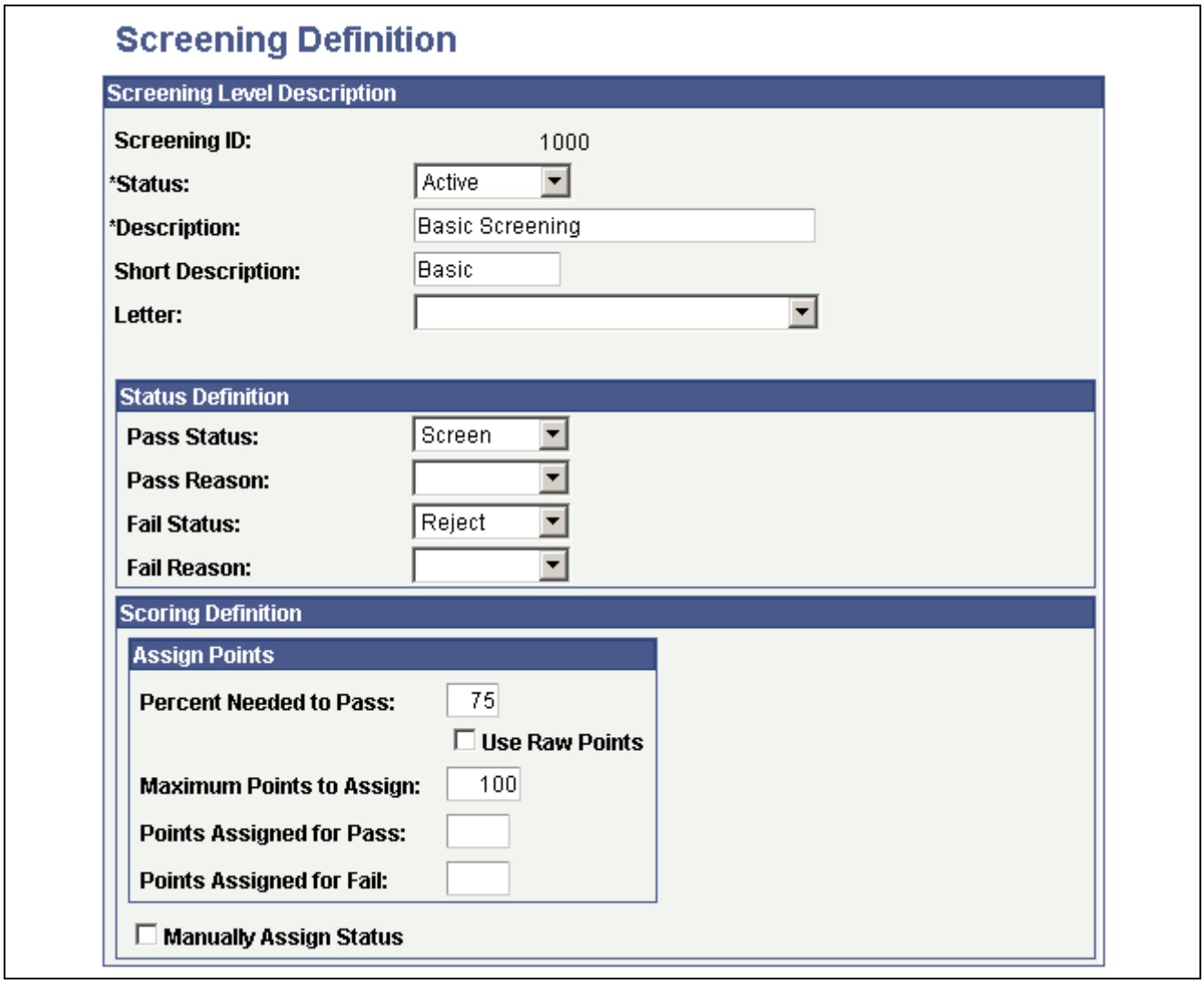
Pages Used to Set Up Applicant Screening

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.

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Screening Definition page

Screening Level Description

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.

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

PeopleSoft delivers the following options:

- HRS_APP_LETTER_ACQ
- HRS_APP_LETTER_ANO
- HRS_APP_LETTER_CR1

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- HRS_APP_LETTER_IR
- HRS_APP_LETTER_LAQ

Your choice here automatically populates the Letter field on the Job Opening Screening Criteria page.

Status Definition

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.

Scoring Definition

This group box defines the points that are used to calculate an applicant's screening score.

Manually Assign Status Select this check box if you want a recruiter or manager to assign the applicant's screening status on the Screening Results page.

Assign Points

This group box is available if the Manual Screening check box is not selected.

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 this check box, if you want the actual accumulated points for an applicant 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.

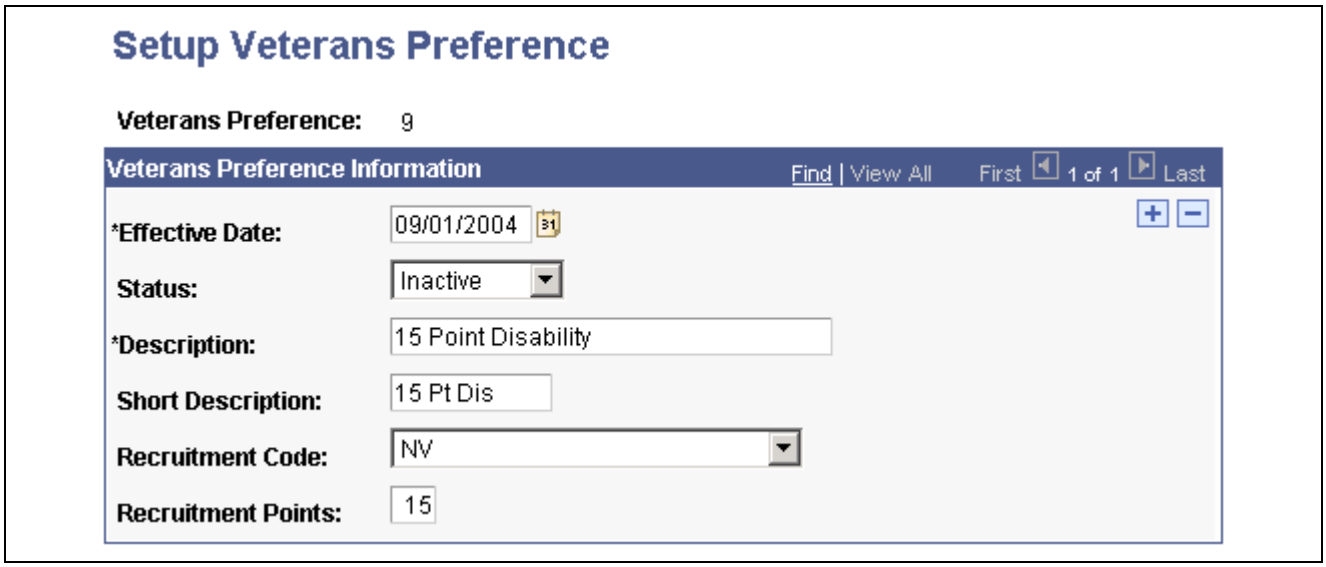
Points Assigned for Pass Defines the points that are assigned to the applicant if the applicant passes the screening level. This overrides any earned points that the applicant received as defined by the job opening screening criteria.

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.

(USF) Setting Up Veterans Preference Codes

Access the Setup Veterans Preference page.

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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.

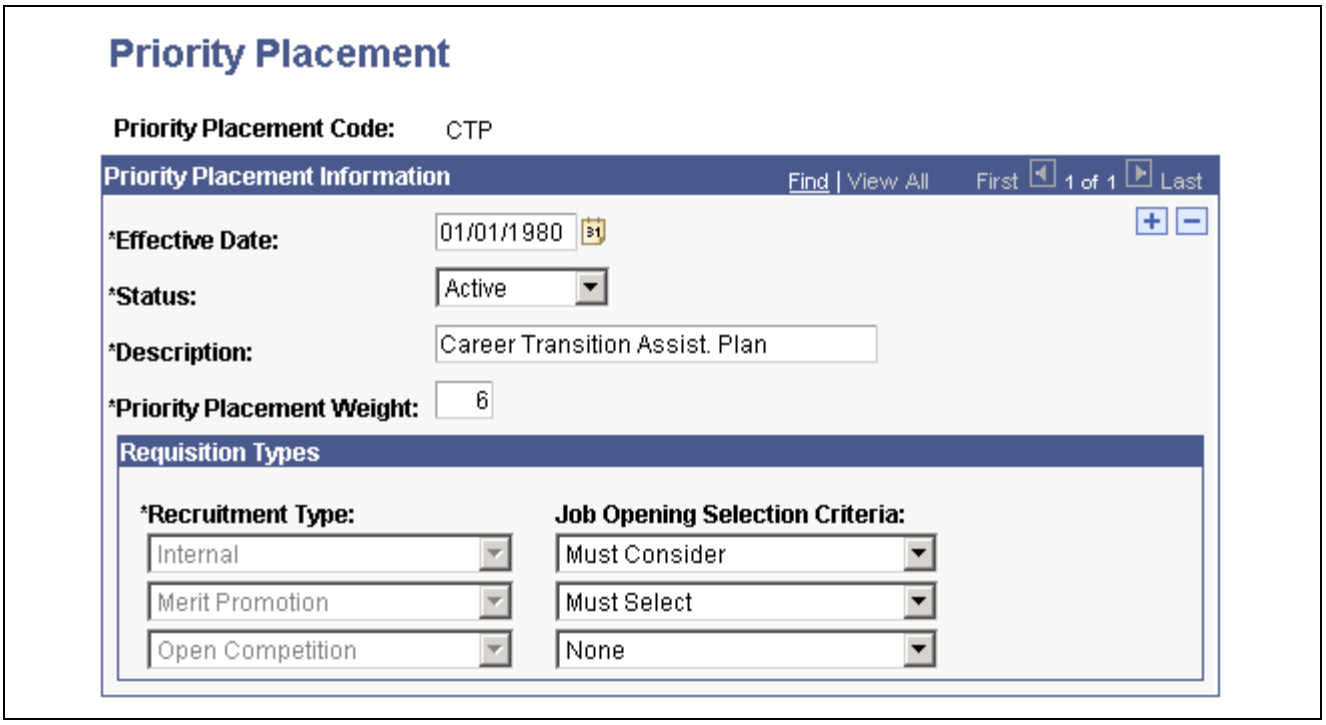
Recruitment Code Select the recruitment code.

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

(USF) Setting Up Priority Placement Codes

Access the Priority Placement page.

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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.

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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 57.

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.

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Interview Evaluation Category page

Creating Interview Ratings

Access the Interview Evaluation Ratings page.



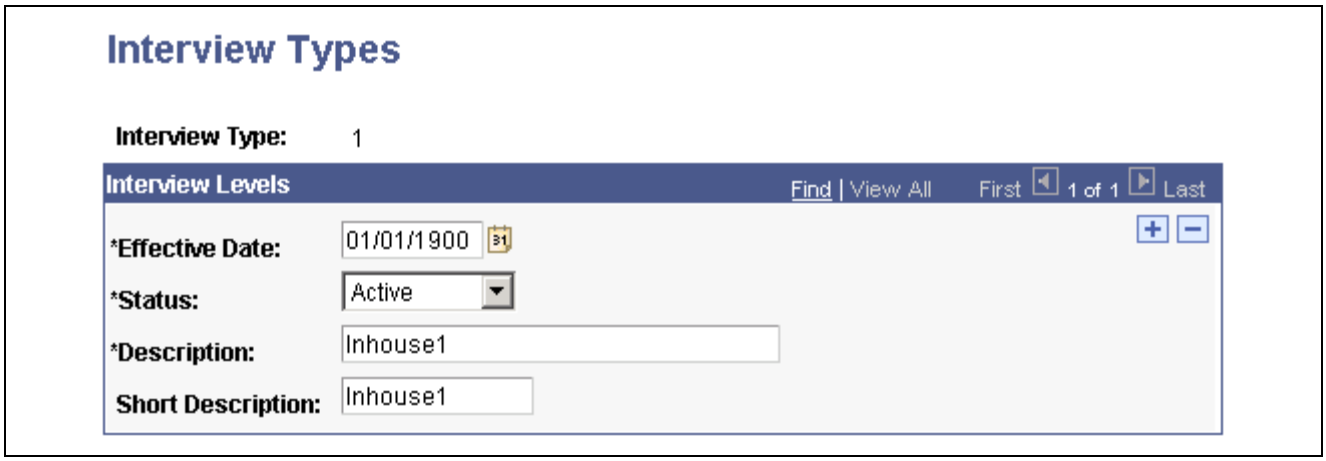
Interview Evaluation Ratings page

Score Enter a score for this evaluation rating.

Creating Interview Types

Access the Interview Types page.

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Interview Types page

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

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 10, “Making Job Offers,” page 233.

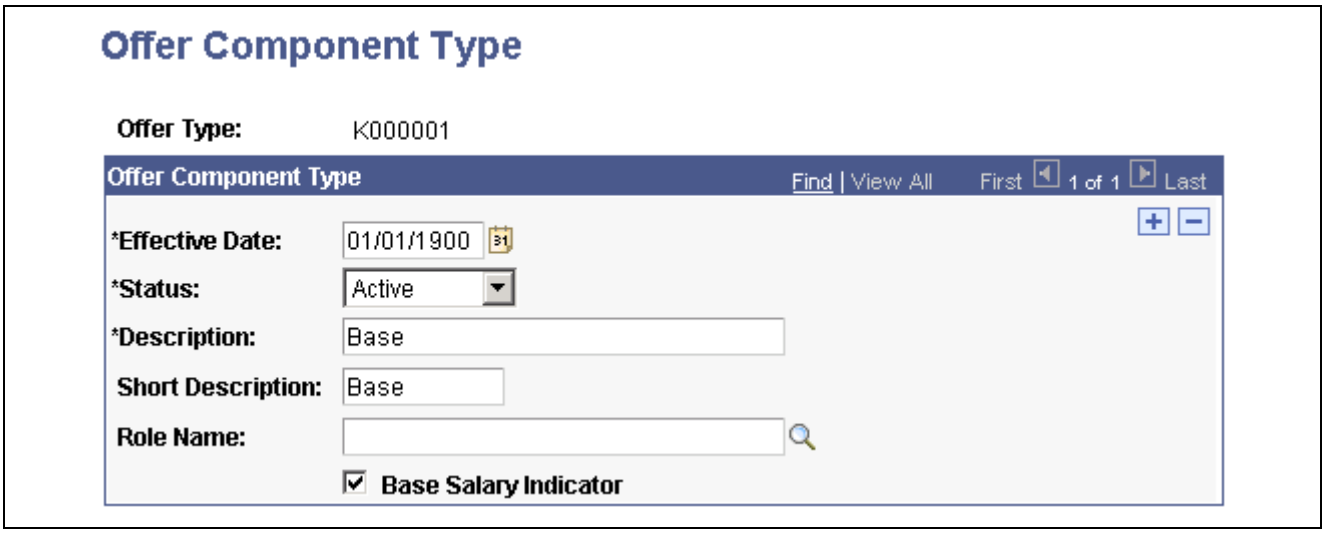
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Pages Used to Set Up Job Offers

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.

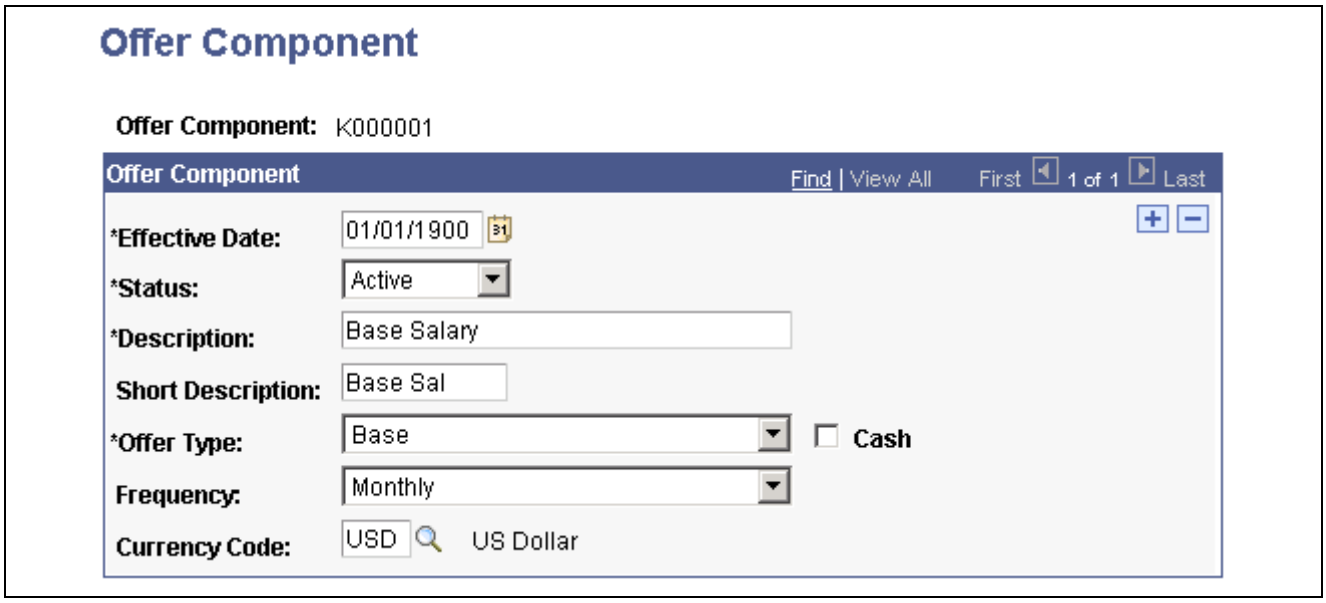
See *Enterprise PeopleTools PeopleBook: Security Administration*

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

Entering Job Offer Component Information

Access the Offer Component page.

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Offer Component page

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

Cash Select this check box if the offer component is received as cash. For example, base salary is a cash component, so you would select this check box, but for stock options, you would leave the check box 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

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

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

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Pages Used to Set Up the Hiring Process

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

Defining Data to Transfer

Access the Manage Hire Setup - Person page.



Manage Hire Setup page

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

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

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

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Competencies

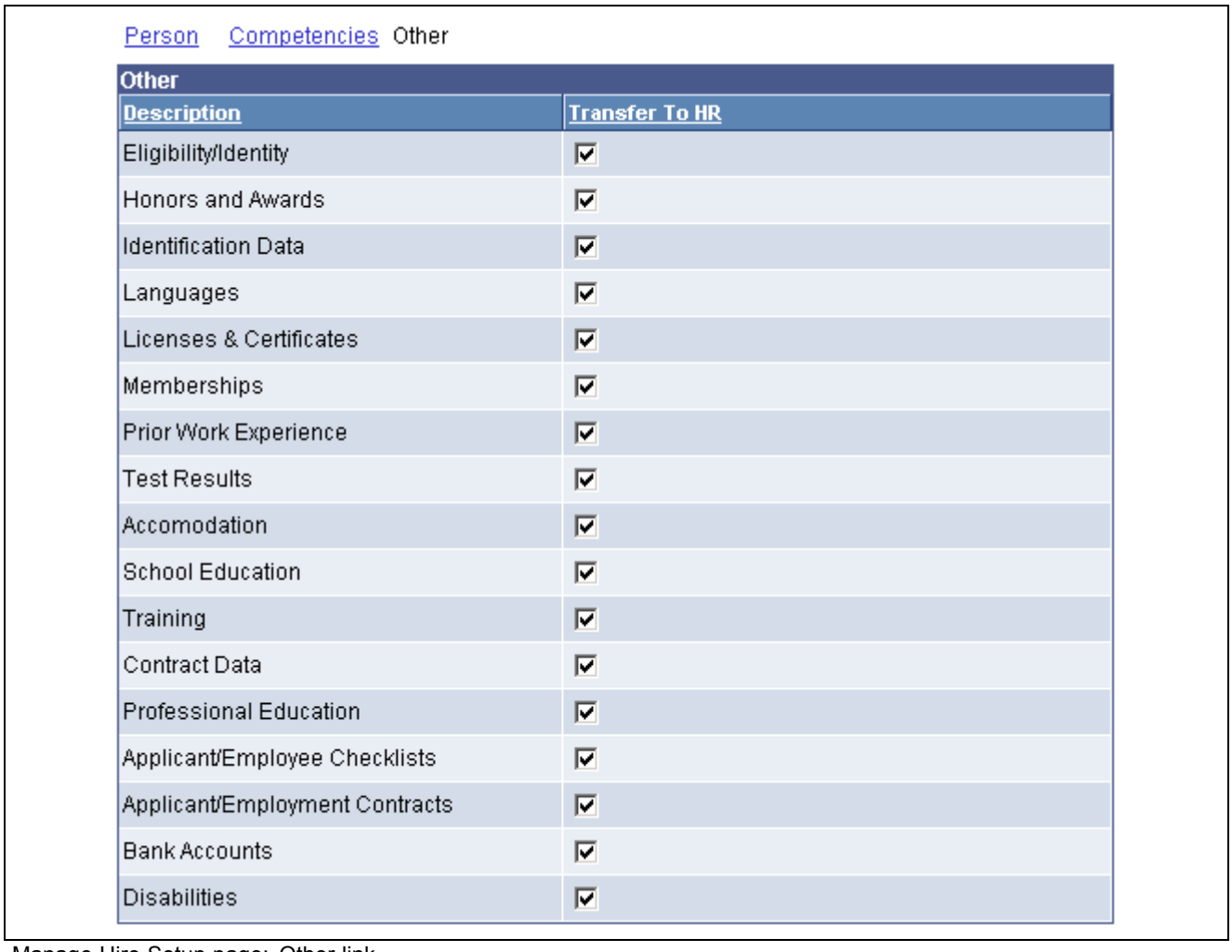
Select the Competencies link.



Manage Hire Setup page: Competencies link

Other

Select the Other link.



Manage Hire Setup page: Other link

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CHAPTER 3

Setting Up Recruiting Templates

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

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

Understanding Recruiting Templates

Recruiting Solutions uses templates to control the layout and information on specific pages within Recruiting Solutions. 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.

There are 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.

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Setting Up Resume Templates

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

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

- Define basic information for resume templates.
- Define resume template pages and sections.
- (IRL) Define resume template pages and sections for community background information.

Understanding Resume Templates

Use resume templates to define the content that you want applicants to enter when they use the Careers (HRS_CE) component to apply for jobs online.

Resume templates define:

- The pages that appear to an employee or external applicant when they apply for jobs online.
- The name of each page.
- The sections that appear on each page.

To help you decide what the layout should be, think about these questions:

- How many pages do you want an applicant to complete when they apply for a job opening?
- What information do you want the applicant to provide regarding the job opening?
- In what order do you want the information presented to the applicant?

Note. Resume templates need to match job opening templates. Otherwise, there can be a mismatch between the information applicants enter when they apply for jobs online. For example, if a resume template includes prescreening questions, the job opening template must also include prescreening questions.

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

Resume Template Setup Steps

To create a resume template:

1. Define basic information for the resume template on the Template Definition page.
2. Specify the structure and contents of the resume template on the Template Sections page.
3. (IRL) Specify community background information on the Country Specific page.
4. (Optional) Associate a resume template to a recruitment template.

   See Chapter 3, "Setting Up Recruiting Templates," Linking Templates to Recruitment Templates, page 61.
5. (Optional) If you use sites, associate a resume template to each site that you create.

   See Chapter 2, "Setting Up Recruiting Processes," Setting Up Sites, page 12.

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Resume Template Selection

When an applicant applies for a job opening online, the system uses the resume template that is associated to the job opening. If the job opening to which the applicant is applying is not associated with a resume template, or if the applicant is not applying to a specific job opening, the system uses the resume template that you specify for that online job application site. If an applicant applies to more than one job opening, and none of the job openings have an associated resume template, the system uses the resume template that you specify for that online job application site.

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

During the merge process, the system:

1. Determines all of the associated resume templates for all job openings to which an applicant applies for a given apply online session.
2. Determines the number of sections associated to each resume template.
3. Determines the resume template with the highest number of sections, and uses that resume template as the base template for the applicant's session.
4. Determines which sections from the remaining templates are not in the base template.
5. Creates a new page called Additional Information and adds the sections that are not in the base template to the new page without duplicating any sections that were in the base template.

Note. The Primary Education and Post-Secondary Education sections always appear together to prevent repetition, as they currently appear within one group box if they are both selected. For example, if the Primary Education section belongs to the base template, and the Post-Secondary Education section belongs to one of the other templates, the system adds the Post-Secondary Education section to the appropriate group box within the base template instead of adding the section to the Additional Information page.

Delivered Sections

For the first page of the resume template, PeopleSoft delivers the following sections from which you can choose:

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

For all pages in a resume template except pages one and two, PeopleSoft delivers the following sections from which you can choose:

- Competencies
- Contact Address
- Contact Details
- Contact Email
- Contact Name

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- Contact Phone
- Federal Preferences
- Federal Priority Placement
- Honors and Awards
- Languages
- Licenses and Certificates
- Memberships
- Online Questionnaire
- Personal Information
- Post-Secondary Education
- Preferences
- Primary/Secondary Education
- References
- Referrals
- Resume
- Submit Resume
- Training
- Work History

(IRL) Community Background Information

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

If you select the Use Community Background option on the Country Specific page, the system adds the Apply Now - Community Background Information page to the resume template. The Apply Now - Community Background Information page appears before any other pages in the resume template. When applicants apply for Northern Ireland job openings online, they must select an option in the Select Community field and click Continue on the Apply Now - Community Background Information page before they can select a resume option or enter application details.

See *PeopleSoft Enterprise Candidate Gateway 9.0 PeopleBook*, “Using Candidate Gateway,” Understanding the Job Application Process.

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

Recruiters can manually enter community background information for applicants when they manually add applicants by using the Add New Applicant - Eligibility & Identity page in the Add New Applicant (HRS_ADD_APPLICANT) component in PeopleSoft Enterprise Talent Acquisition Manager. Community background information fields appear under the United Kingdom flag in the Personal Information group box.

See Chapter 7, “Entering Applicants,” Adding Eligibility and Identity Information, page 185.

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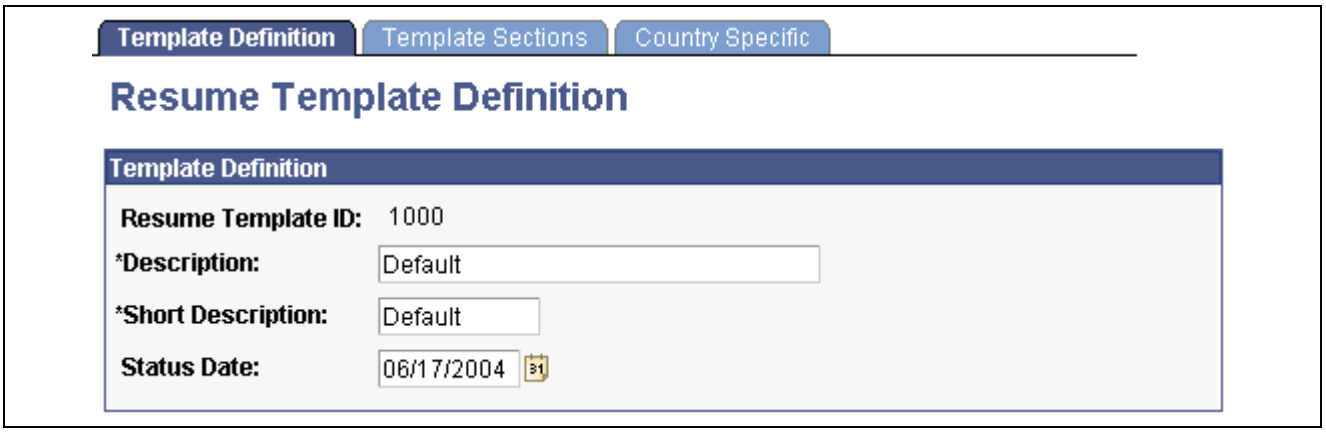
Recruiters can update community background information for existing applicants by using the Manage Applicant - Applicant Data: Eligibility & Identity page in the Manage Applicant (HRS_MANAGE_APP) component. Community background information fields appear under the United Kingdom flag in the Personal Information group box.

Pages Used to Set Up Resume Templates

Page Name	Object Name	Navigation	Usage
Template Definition	HRS_RES_TMPL1	Set Up HRMS, Product Related, Recruiting, Templates, Resume Template, Template Definition	Define basic information for resume templates.
Template Sections	HRS_RES_TMPL2	Set Up HRMS, Product Related, Recruiting, Templates, Resume Template, Template Sections	Define resume template pages and sections.
Country Specific	HRS_RES_TMPL3	Set Up HRMS, Product Related, Recruiting, Templates, Resume Template, Country Specific	(IRL) Define resume template pages and sections for community background information. **Note.** Only users with Northern Ireland in their user profile can access this page.

Defining Basic Information for Resume Templates

Access the Template Definition page.



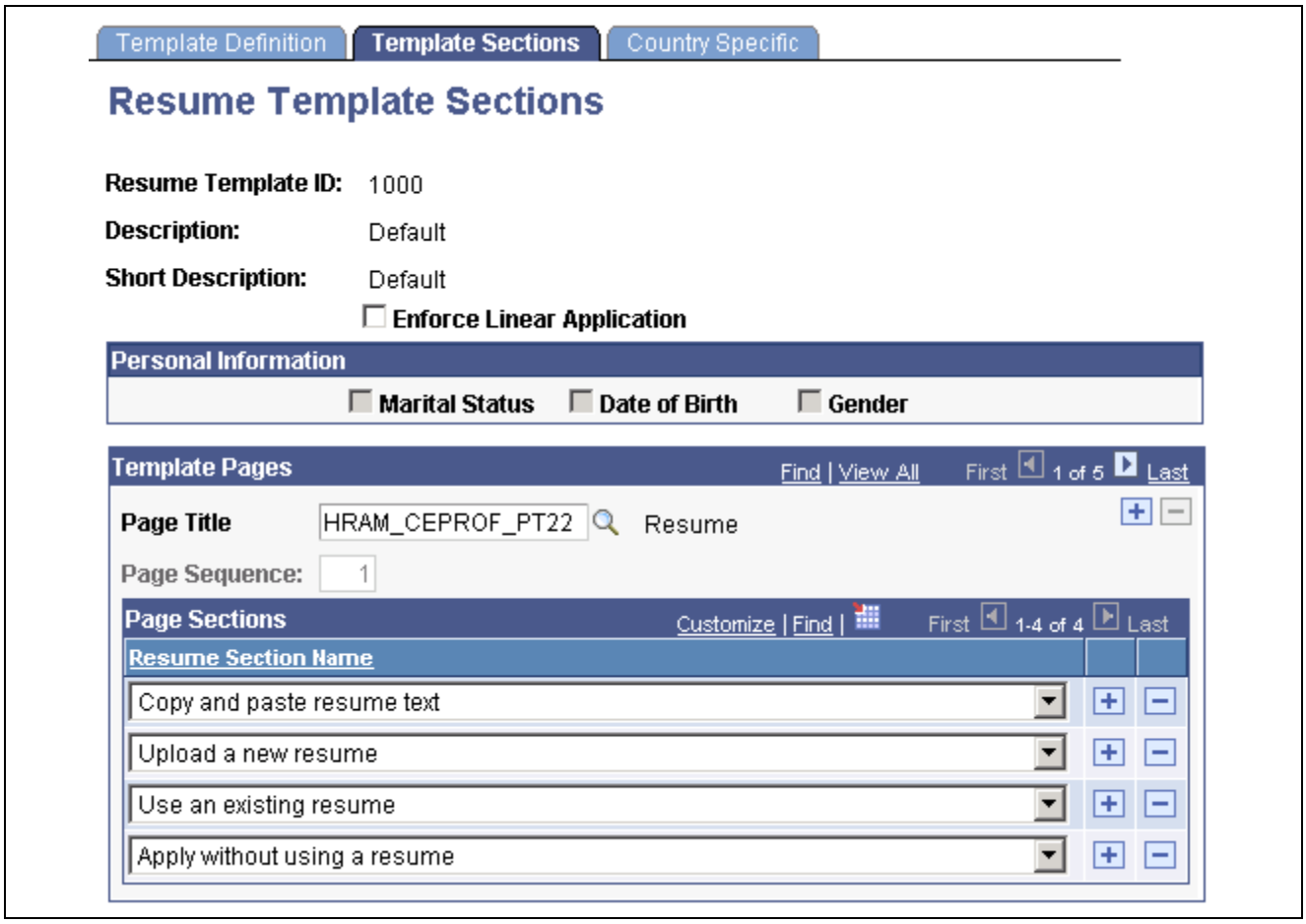
Template Definition page

Resume Template ID Displays the resume template ID that the system assigns automatically. To determine what number to assign, the system increments the number by one in the Resume Template ID field on the Last Assigned Ids page.

Defining Resume Template Pages and Sections

Access the Template Sections page.

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Template Sections page

Enforce Linear Application Select this check box to have the system enforce the order in which an applicant completes pages when they apply for jobs online. If you select this check box, applicants must complete pages in the order in which you set up the pages in the resume template. For example, if there are four page links on the Apply Now - Complete Application page, only the first page link is active. The user must click Next for the second page link to become active and so on. If you clear this check box, all page links on the Apply Now - Complete Application page are active and the applicant can access the pages in any order.

Personal Information

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

Marital Status, Date of Birth, and **Gender** Select this check box if you want the applicant to provide their marital status, date of birth, and gender.

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Template Pages

Use this group box to define the pages for the template, the sequence of the pages, and the sections on each page. Each resume template must have two pages. When you create a resume template, the system creates the first two pages for you and populates the page titles, page sequence numbers, and sections with default values. The first page always contains resume options. You can change the page title and sections for this page. The second page always contains contact details information. You can modify only the page title for this page.

Page Title Select a page title. Only text IDs with HRAM (RS Applicant Manager) as the object owner identifier appear in the system prompt as valid values. Page titles for all pages other than pages one and two appear as links on the Apply Now - Complete Application page. You click a link to access the page and sections on that page.

When you select a different value in the Page Title field for pages one and two, the system does not change the page titles in the Careers component. To modify the page titles for pages one and two, you must make the change in the text catalog. As delivered, the page titles for pages one and two are Apply Now - Choose Resume and My Profile, respectively.

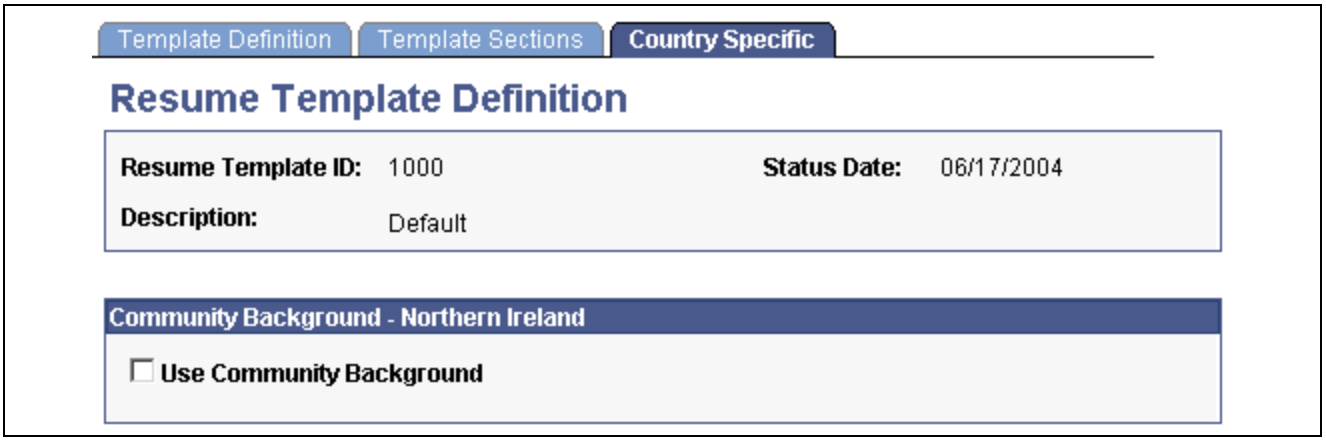
Page Sequence Enter the sequence in which this page will appear. You cannot edit this field for pages one and two.

Resume Section Name Select the resume sections that you want to include on this page. PeopleSoft delivers 27 sections.

The system automatically populates pages one and two with default sections. You can edit the default sections for page one, but you cannot edit the default sections that appear for page two.

(IRL) Defining Resume Template Pages and Sections for Community Background Information

Access the Country Specific page.



Country Specific page

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

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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.

Note. Works Council information only appears 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.

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Prerequisites

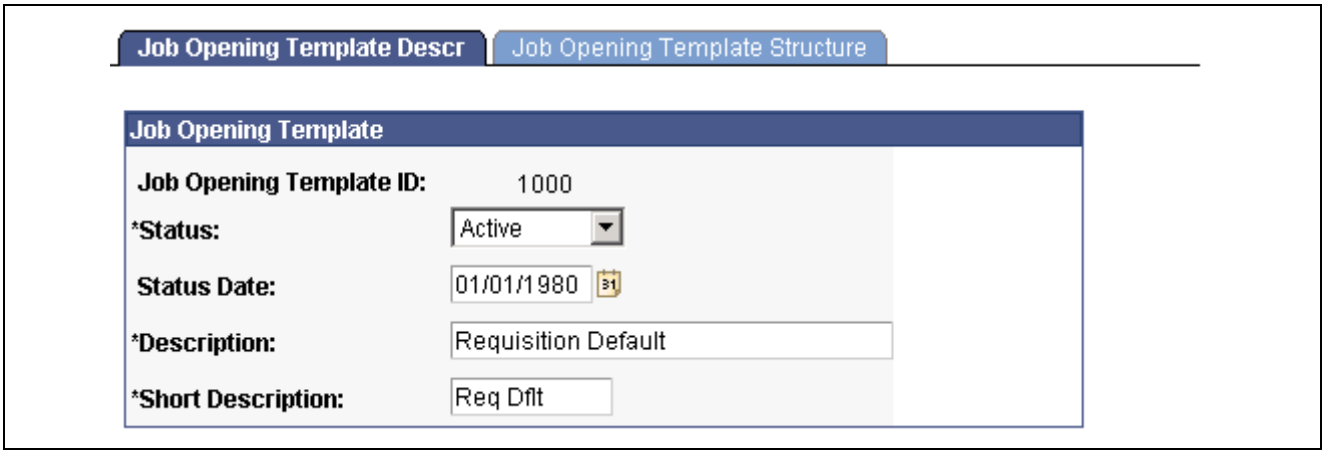
For the Works Council Information section to appear as an option in the job opening template, you must select the Optional Works Council option on the Recruiting Installation - Installation Options page.

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.



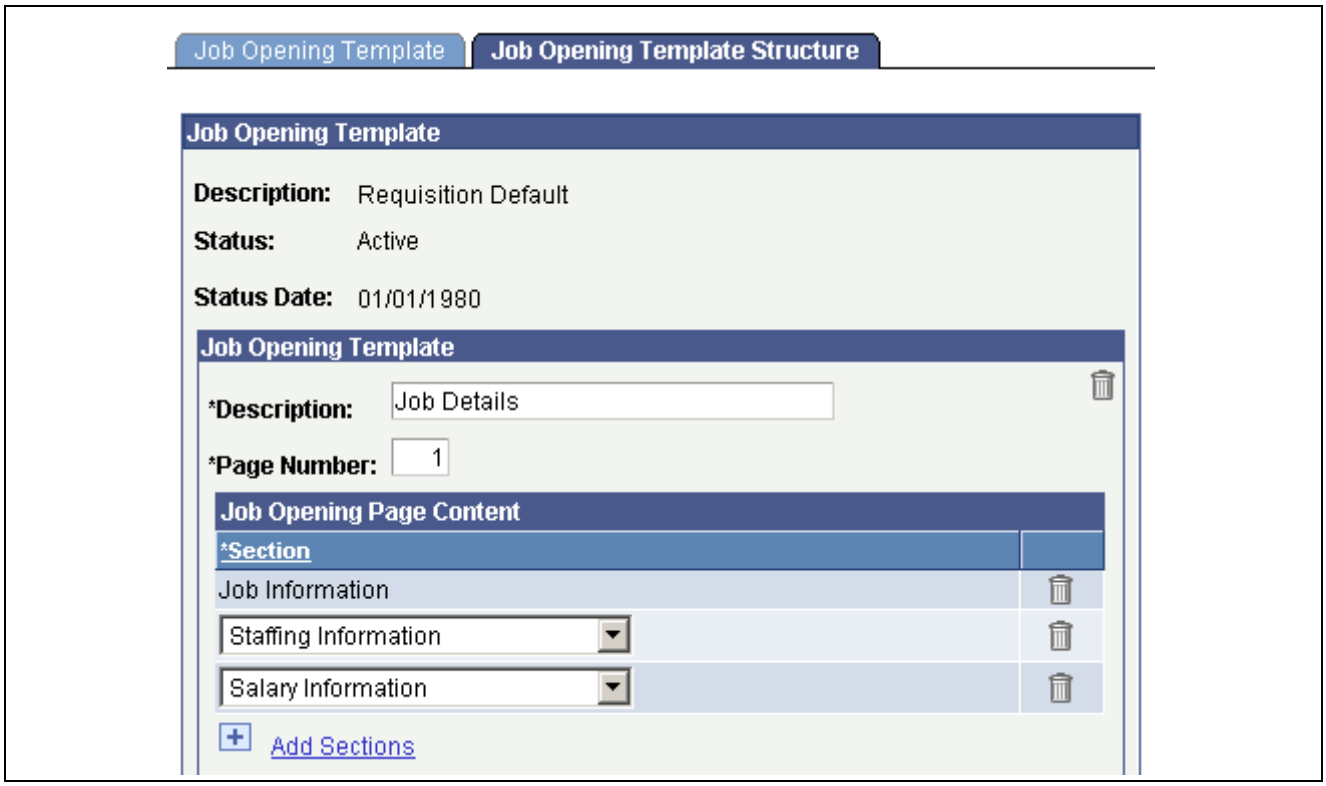
Job Opening Template Descr page

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.

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Job Opening Template Structure page

Note. This is only a partial screenshot.

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 the 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.

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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 Recruiting Processes," Setting Up Job Postings, page 18.

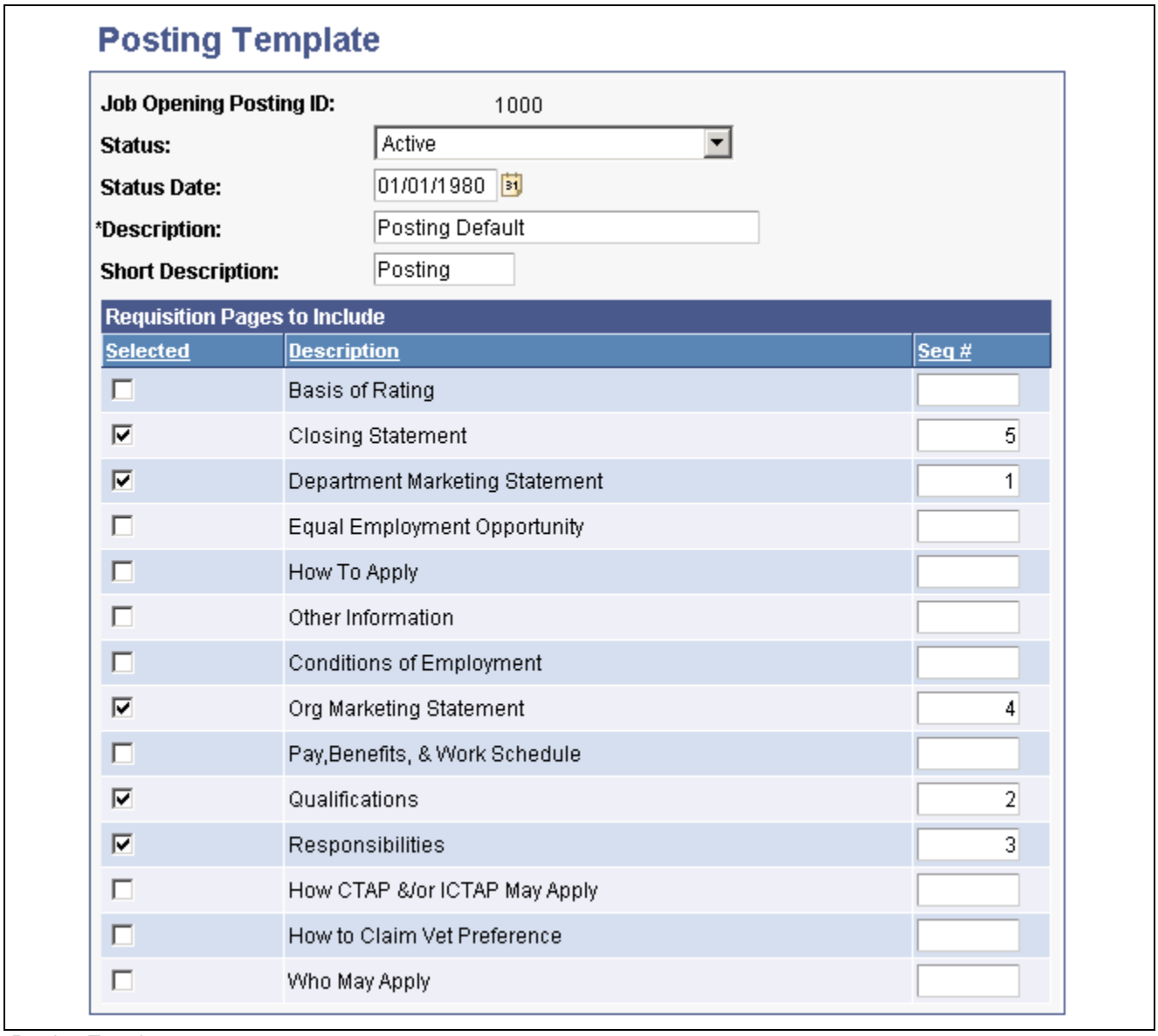
Page Used to Set Up Job Opening Posting Templates

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.

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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.

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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 6, "Creating Job Openings," Adding Screening Criteria to Screening Levels, page 145.

Prerequisite

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

See Chapter 2, "Setting Up Recruiting Processes," Setting Up Applicant Screening, page 29.

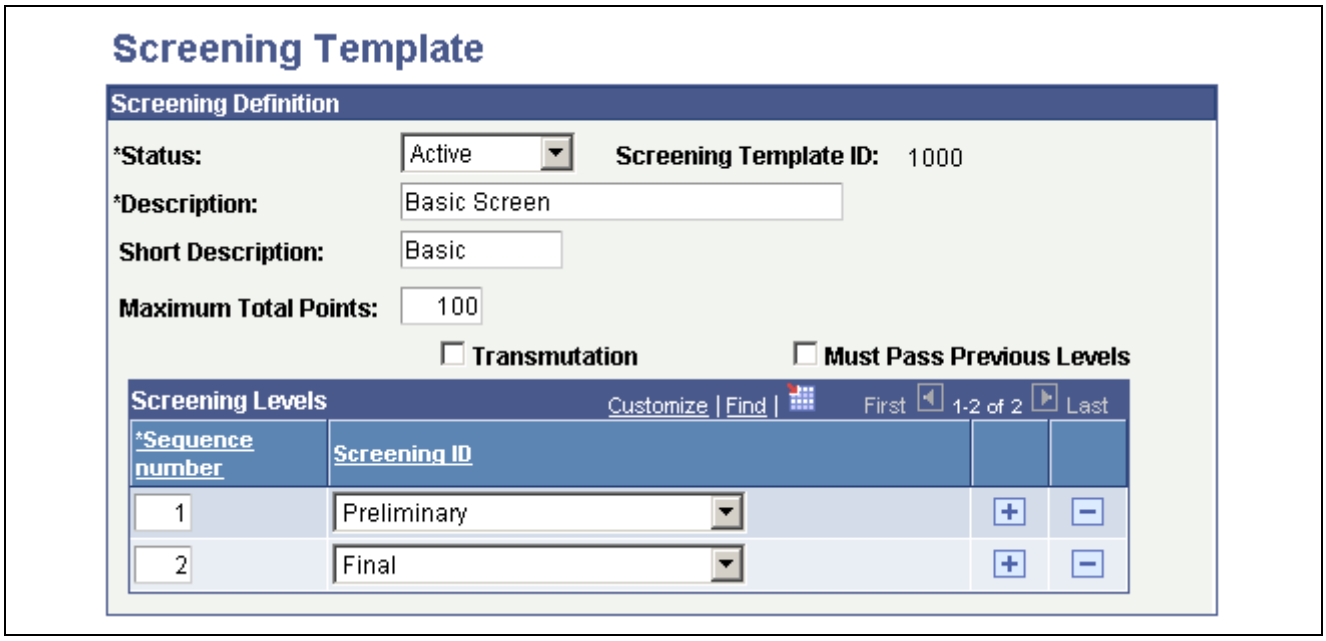
Page Used To Set Up Screening Templates

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.

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Screening Template page

Screening Definition

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

Transmutation Select this check box if the score is to be transmuted, based on either an hourly or salaried job.

Must Pass Previous Levels Select this check box if the applicant must pass the previous screening level before being evaluated for the next screening level. This applies only to screening levels, listed in the Screening Levels group box, with a sequence number greater than *1*.

(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 this check box 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.

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Rank Candidates of Category 2 Select this check box 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 this check box 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 this check box 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 9, “Interviewing Applicants,” Completing Interview Evaluations, page 222

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Prerequisites

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

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

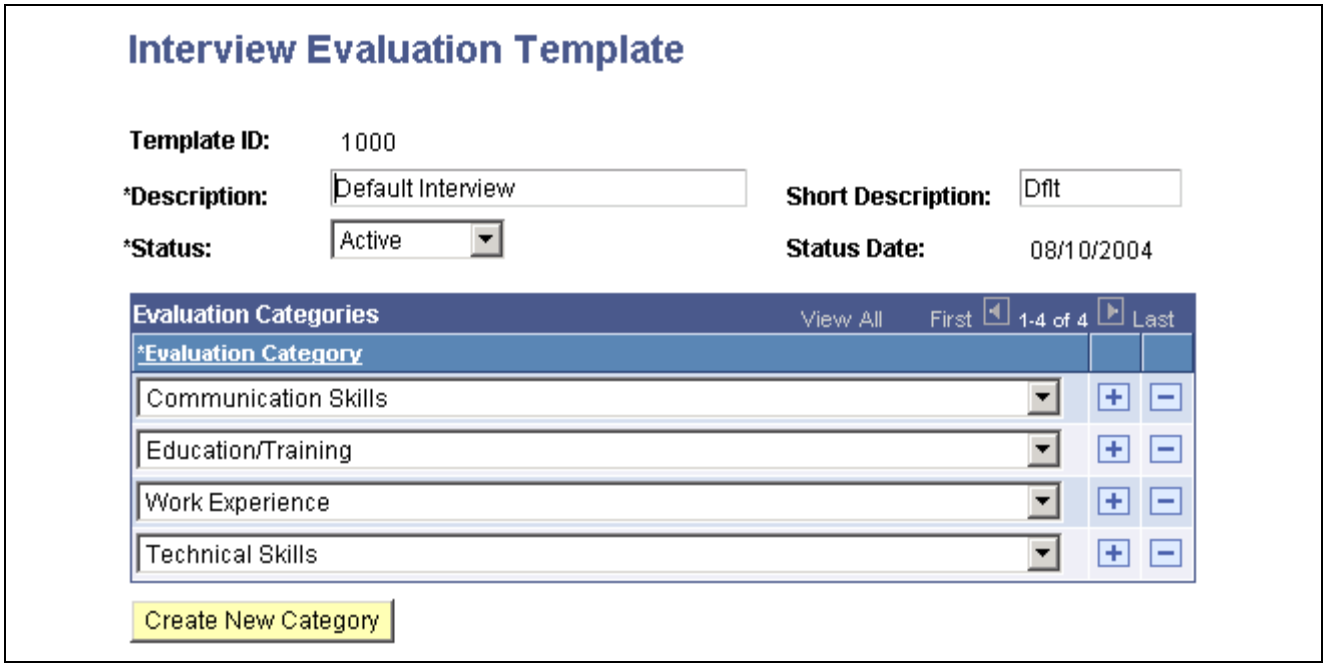
See Chapter 9, "Interviewing Applicants," Completing Interview Evaluations, page 222.

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.

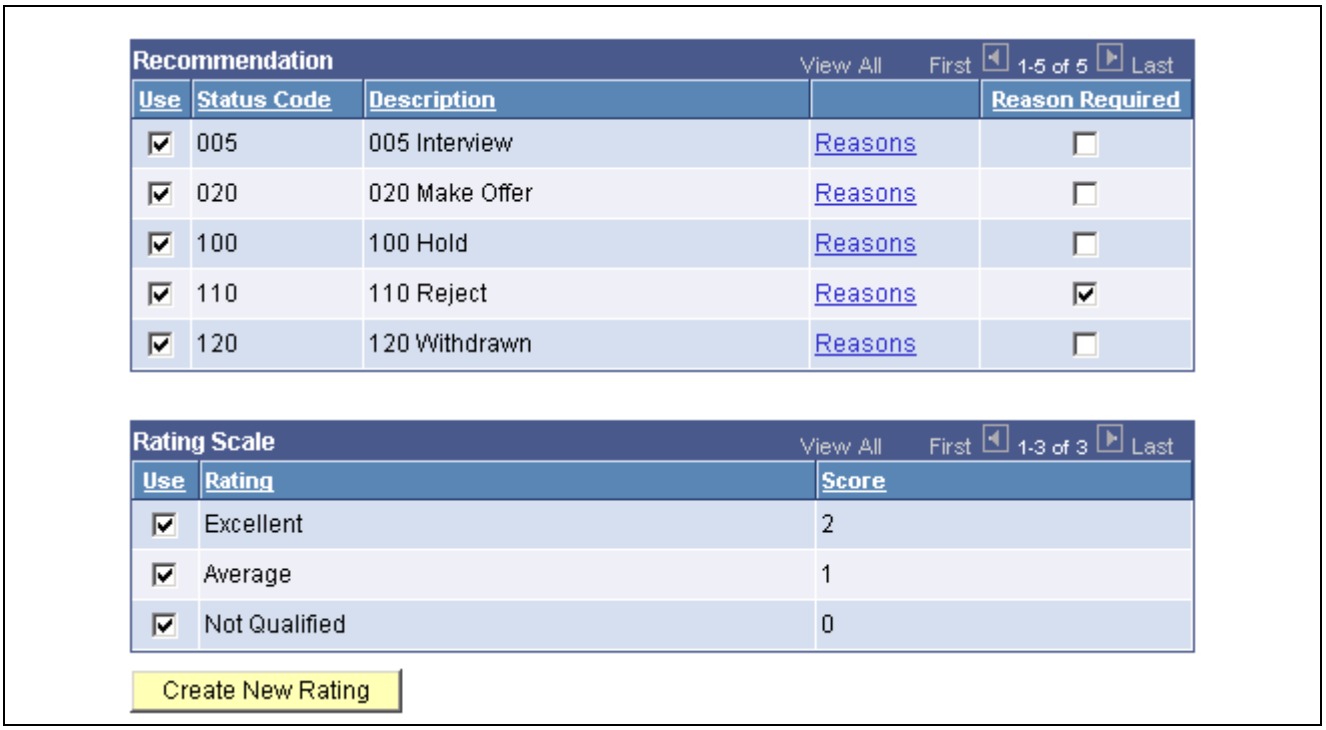
Creating an Interview Evaluation Template

Access the Interview Evaluation Template page.



Interview Evaluation Template page (1 of 2)

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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 this check box 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 this check box 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 9, "Interviewing Applicants," Completing Interview Evaluations, page 222.

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Rating Scale

Use	Select this check box 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:

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- (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.

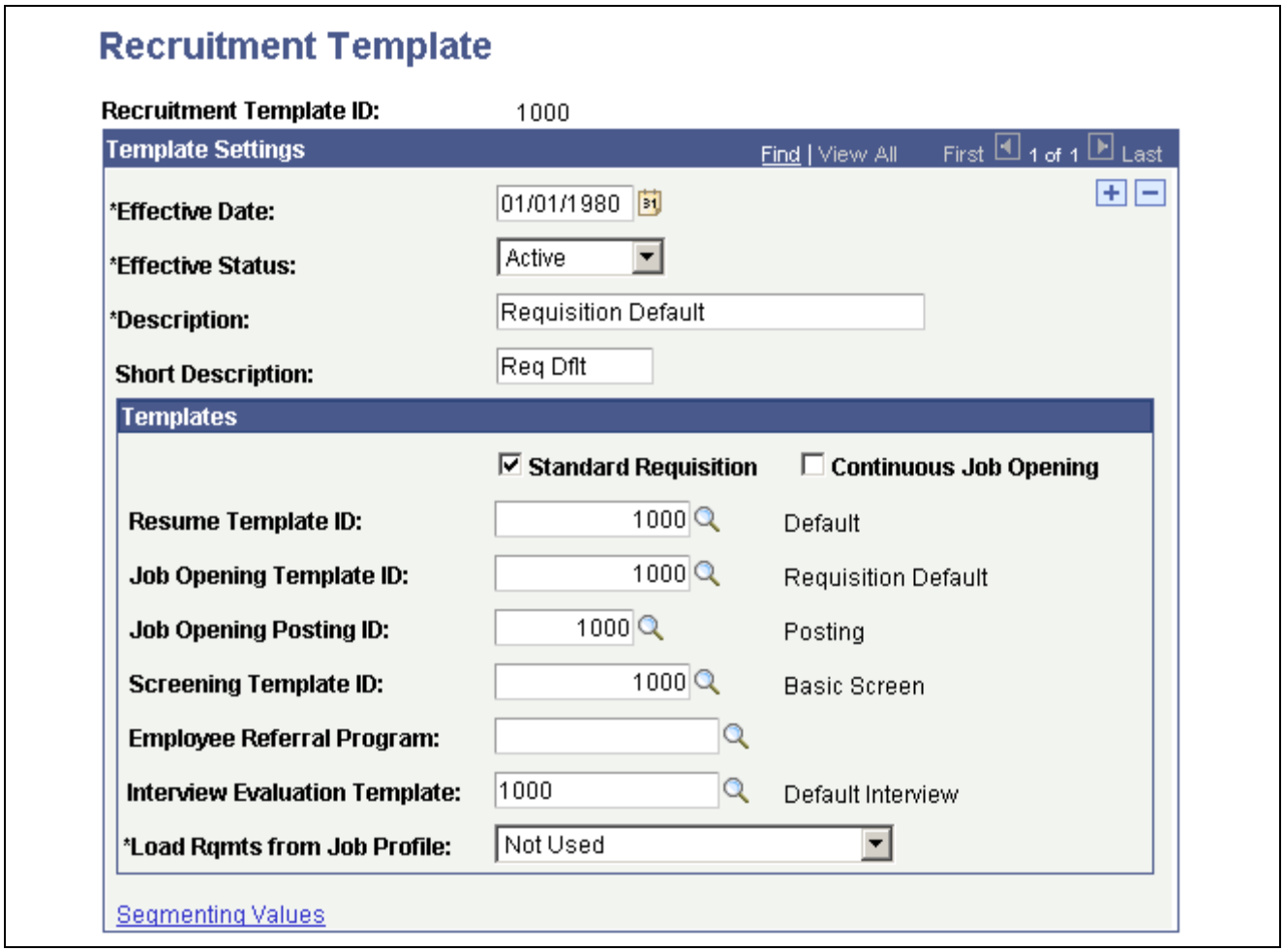
Pages Used to Set Up Recruitment Templates

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.

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Recruitment Template page

Templates

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

Continuous Job Posting Select this check box 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.

Employee Referral Program (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.

Interview Evaluation Template Select the interview evaluation template that you want to link to this recruitment template.

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Load Rqmts from Job Profile (load requirements from job profile)

Use this field if you have selected Job Profile in the Template Segmenting Type on the Recruiting Installation - Installation Options page.

Select the source from which want the system to pull the competencies and accomplishments into the job opening. Values are:

- *Job Code*
- *Job Family*
- *Position*
- *Salary Grade*

Segmenting Values

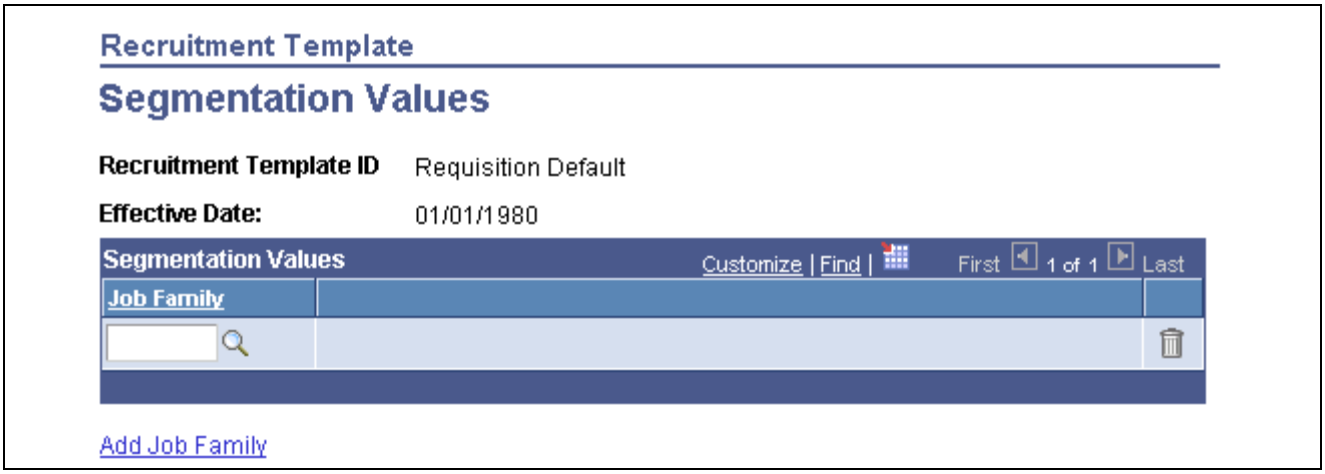
Click to display the Segmenting Values page.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles, "Getting Started with Manage Profiles"

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 Recruiting Processes," Defining Recruiting Installation Defaults, page 7.

Segmentation Values

Select the appropriate segmentation values for the recruitment template.

The field that appears in the grid is determined by the value entered in the Template Segmenting Type field on the Recruiting Installation - Installation Options page.

When creating a new job opening, the system used the values entered in this grid to determine which recruitment template to associate with the job opening.

See Chapter 2, "Setting Up Recruiting Processes," Setting Up Implementation Defaults, page 6.

See Chapter 6, "Creating Job Openings," page 121.

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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.

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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

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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

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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.*

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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.

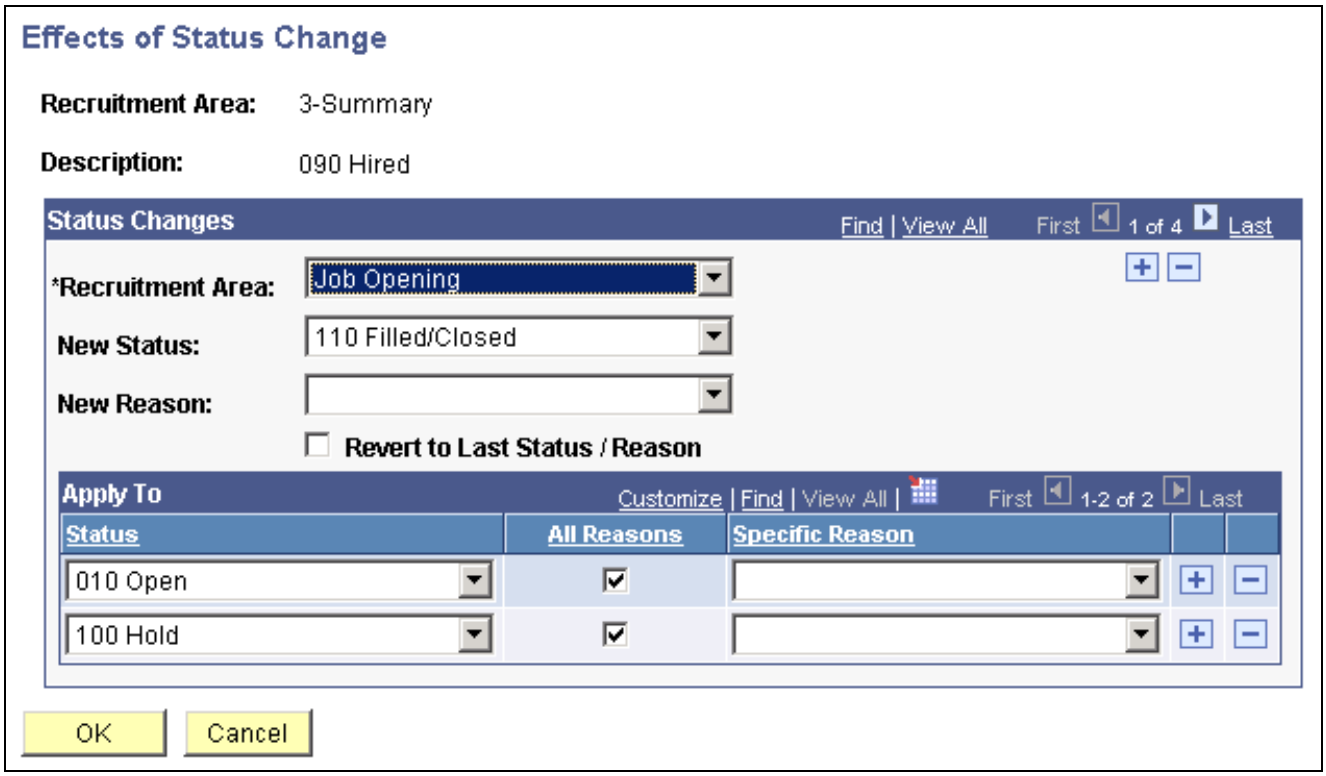
You define the rules for changing status values on the Effects of Status Change page.

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*.

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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

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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*

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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*

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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*

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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*

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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* *Interview Offer* *Hold*	Recruitment Summary for current applicant and job opening	*Accepted*

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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* *Interview Offer* *Hold*	Recruitment Summary for current applicant and other job openings	*Hold*
Offer	*Accept*	*Review* *Linked* *Applied* *Screen* *Route* *Interview Offer* *Hold*	Recruitment Summary for other applicants and current job openings	*Hold*
Offer	*Acceptance Withdrawn*	*Review* *Linked* *Applied* *Screen* *Route* *Interview Ready 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

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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* *Interview Offer* *Hold*	Recruitment Summary for current applicant and other job openings	*Reject - Offer rejected*
Offer	*Offer Withdrawn*	*Review* *Linked* *Applied* *Screen* *Route* *Interview Offer* *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.

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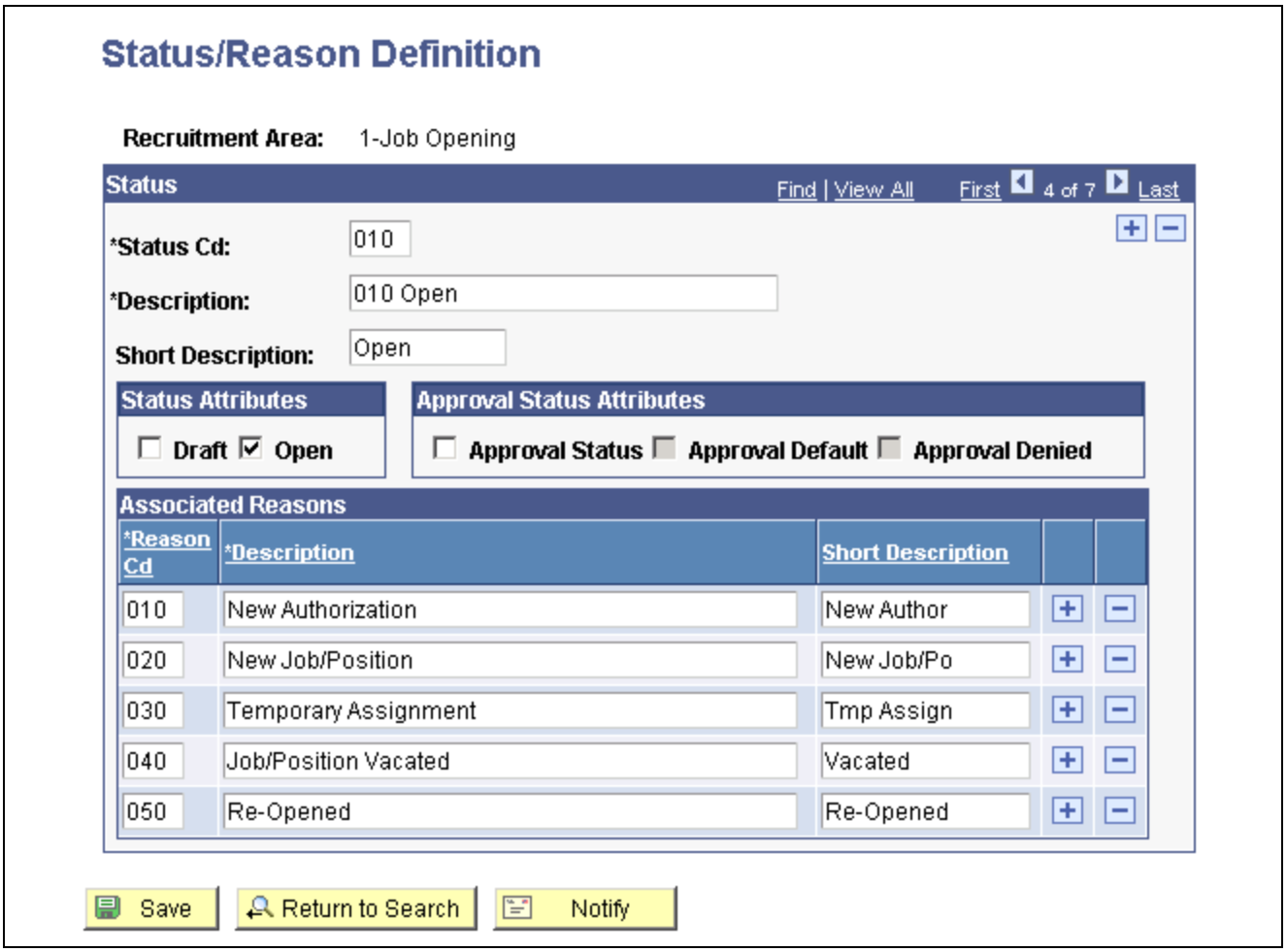
Pages Used to Set Up Recruiting Statuses

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.

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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.

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

Setting Up Recruitment Rules

Access the Recruitment Area Rules page.



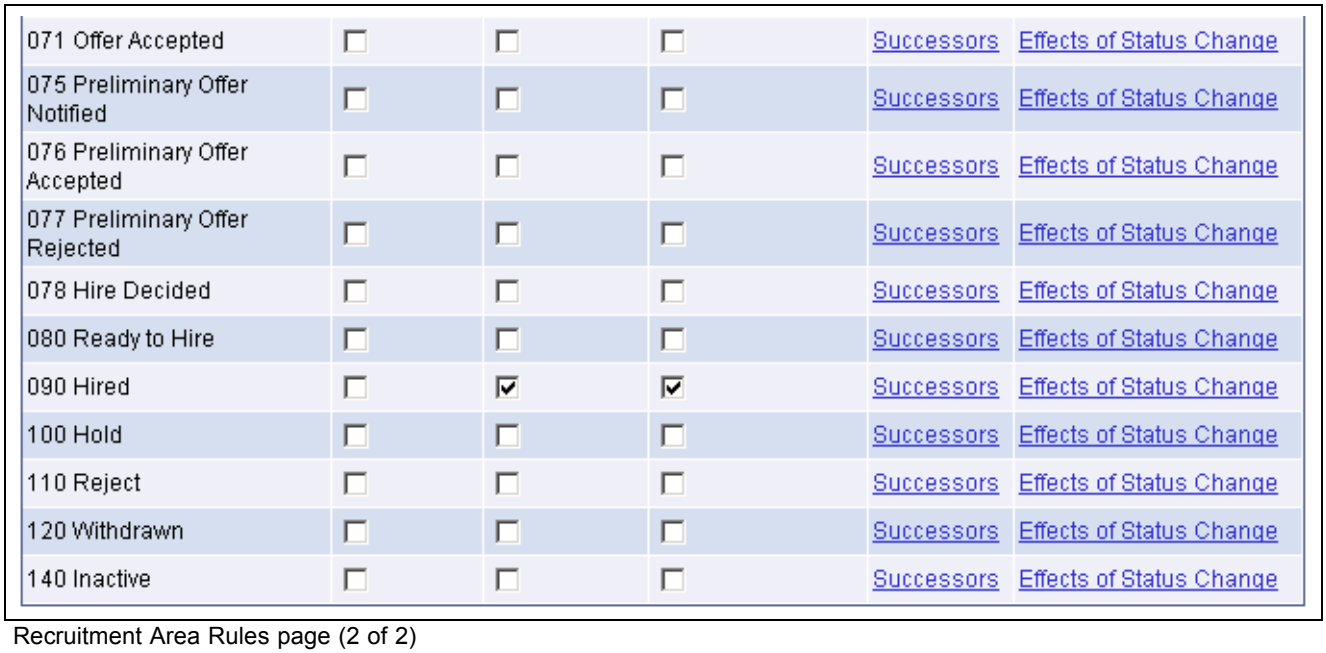
Recruitment Area Rules

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 this check box 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.

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Complete Select this check box 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 this check box 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.

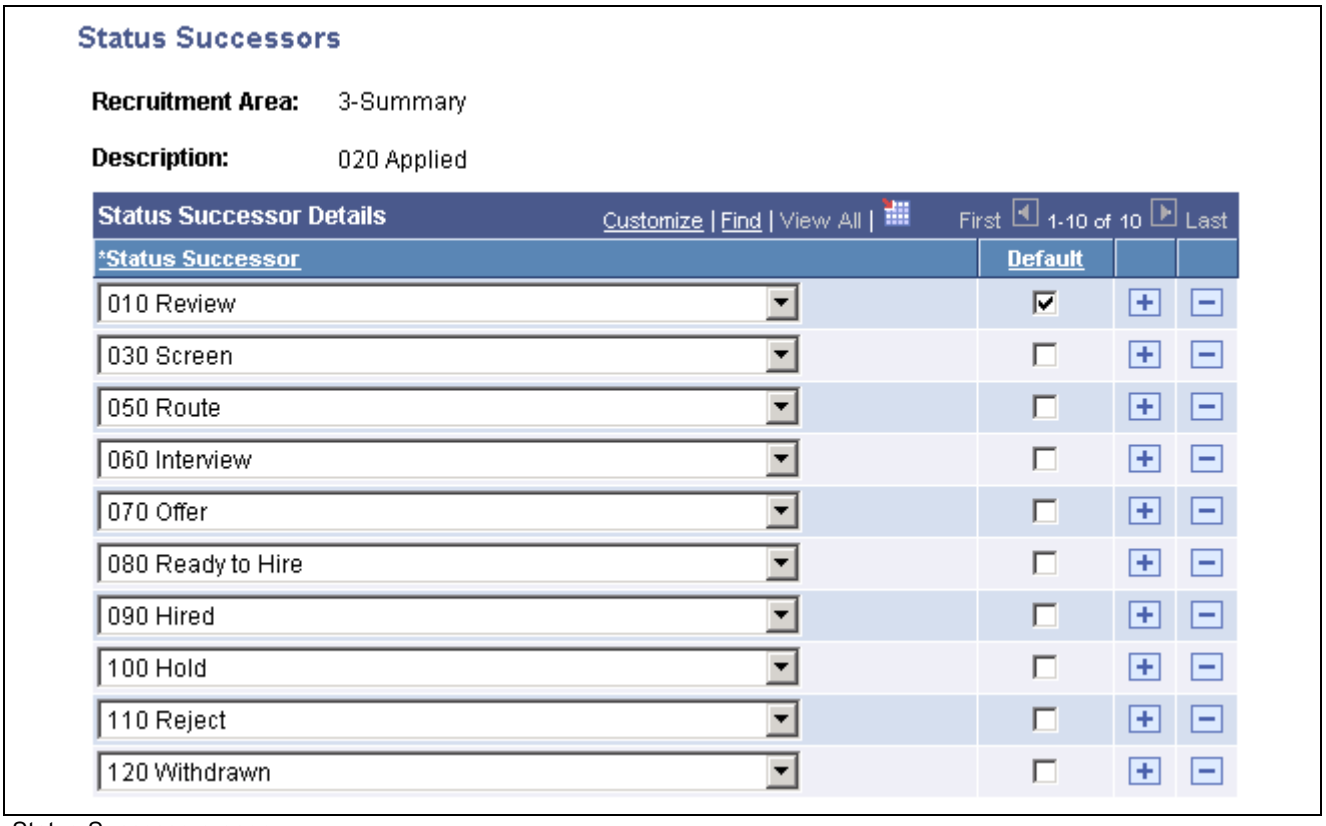
For all other areas, the *OtherStsEffct* template is used.

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

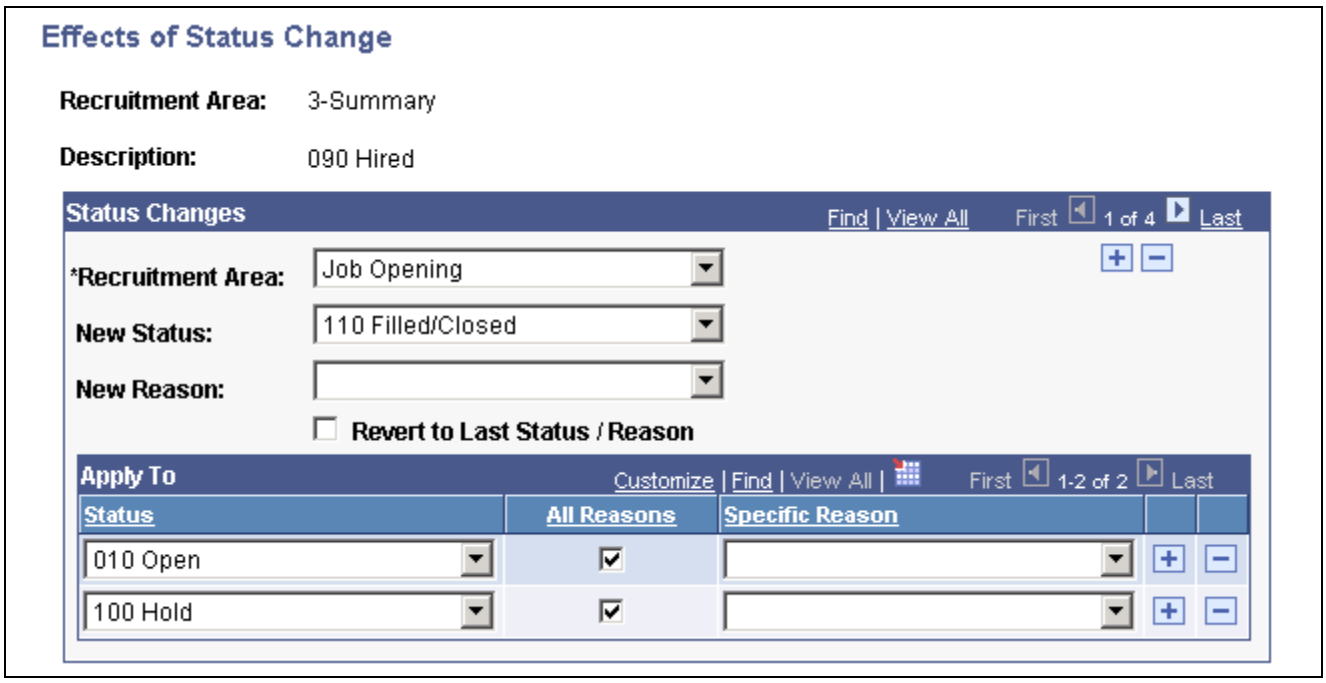
Status Successor Add the status codes that are valid successors to the status that is shown in Description.

Default Select the check box next to the status that is the most likely successor.

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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 this check box 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.

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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.

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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:

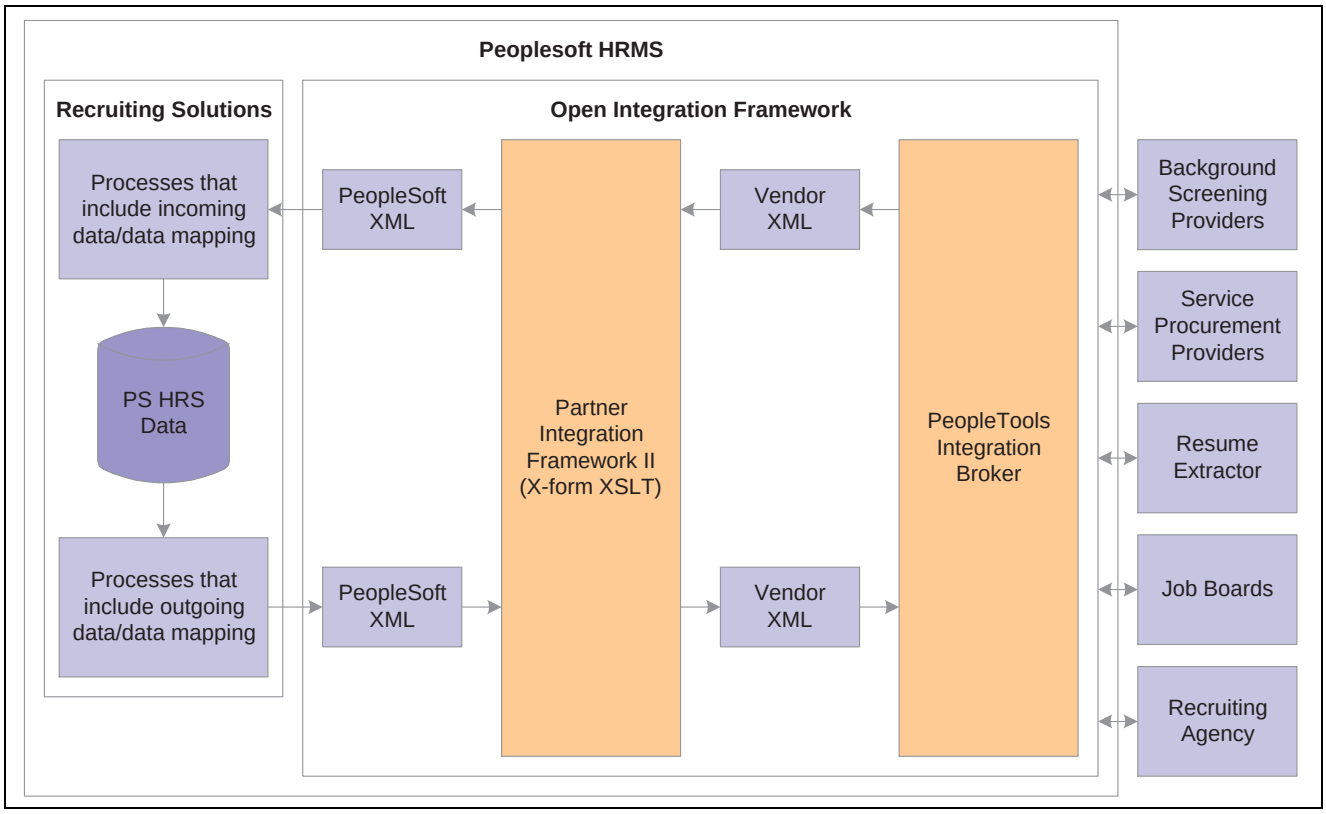
- Staffing suppliers.
- Resume extractors.
- Background screening providers.

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:

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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:

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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:

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

Setting Up Recruiting Vendors

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

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

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

Understanding How to Set Up Recruiting Vendors

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

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

   See *Enterprise PeopleTools 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.

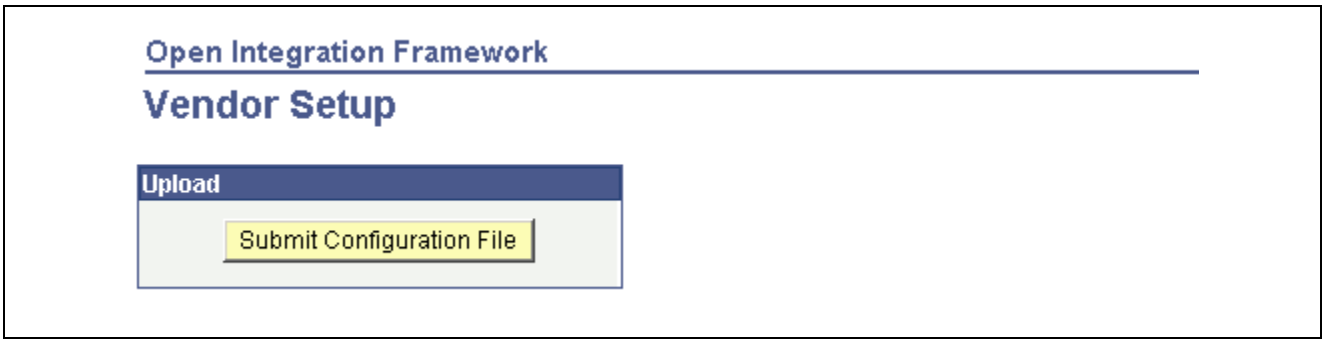
Pages Used to Set Up Recruiting Vendors

Page Name	Object Name	Navigation	Usage
Vendor Setup	HRS_VENDOR_FILE	Set Up HRMS, Product Related, Recruiting, Integration, Vendor, Open Integration Framework - Vendor Setup	Load a vendor configuration file.
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.

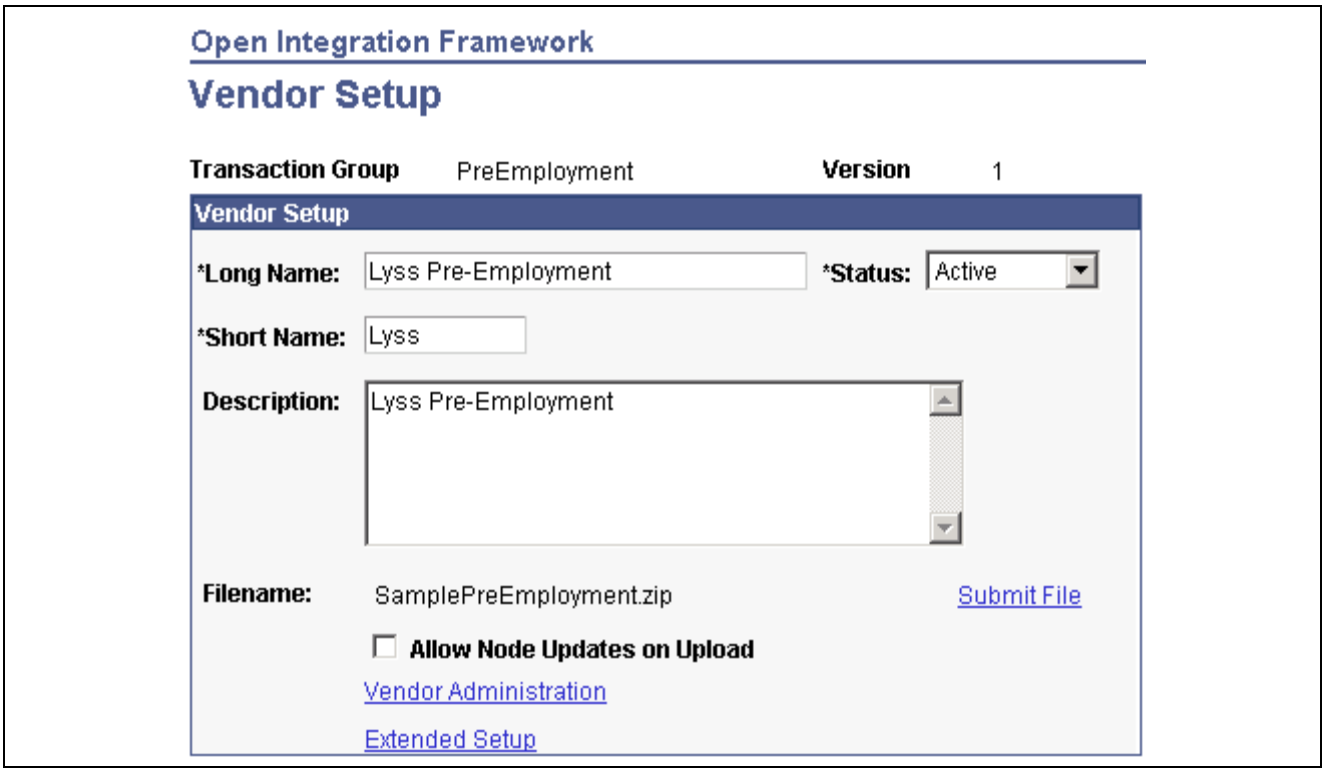
Loading a Vendor Configuration File

Access the Open Integration Framework - Vendor Setup page.

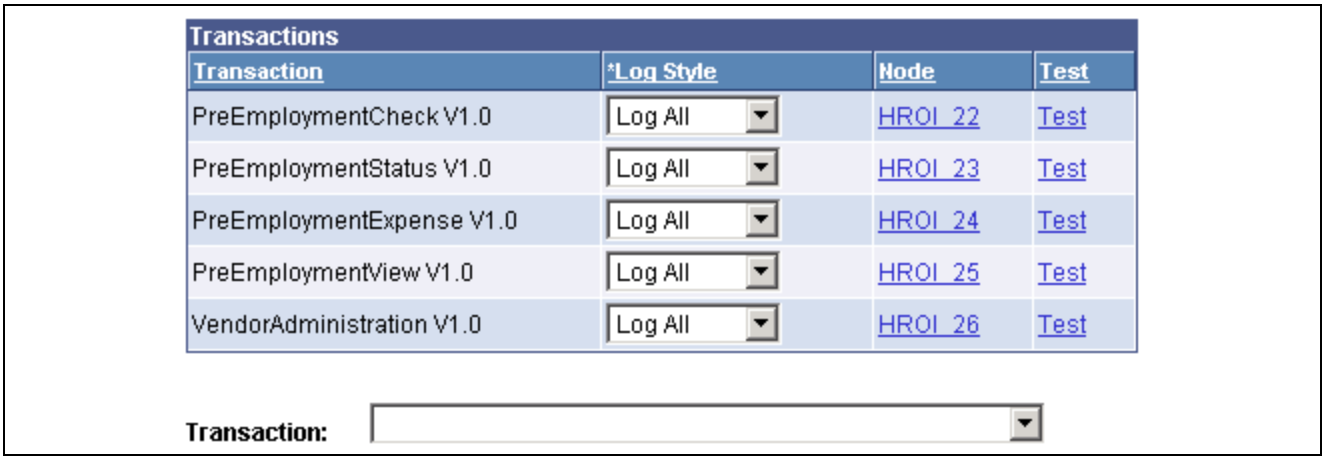
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Vendor Setup page (1 of 3)



Vendor Setup page (2 of 3)



Vendor Setup page (3 of 3)

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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.

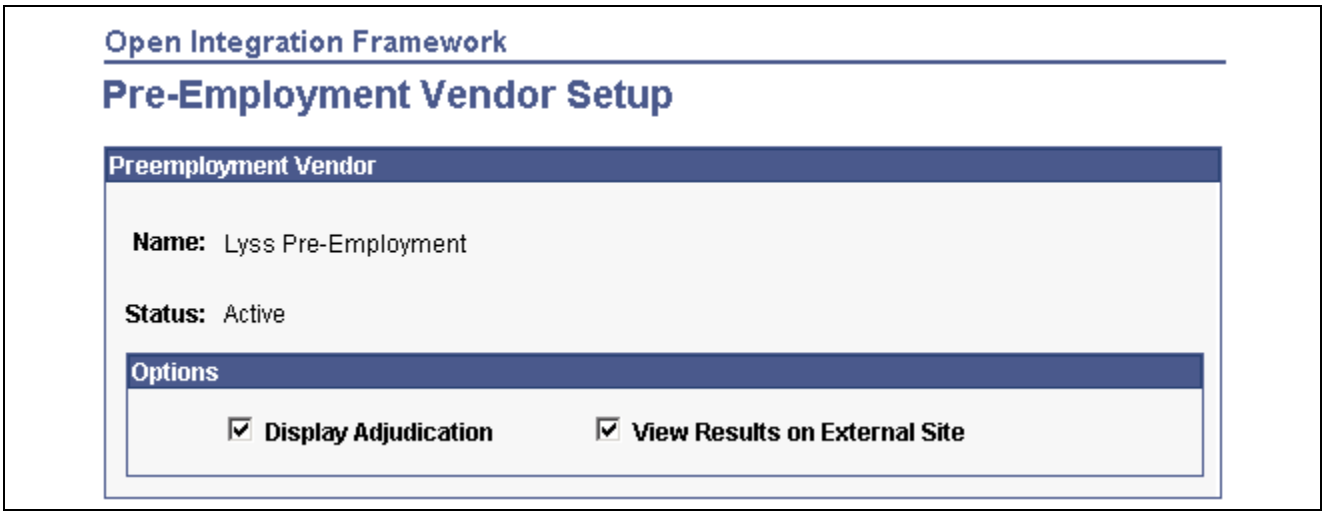
Node Displays the node name that is associated with the vendor's transaction. These node names are dynamically created. Click a node link to access the Connectors page.

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 Pre-Employment Vendor Setup page.

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Pre-Employment Vendor Setup page

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

View Results on External Site Select this check box to make the View Results link on the Pre-employment Check - Pre-employment Check Details page visible to managers, recruiters, and recruiting administrators. Users click the View Results link to access a detailed page of the pre-employment inquiry on the vendor site.

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.

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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.

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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.

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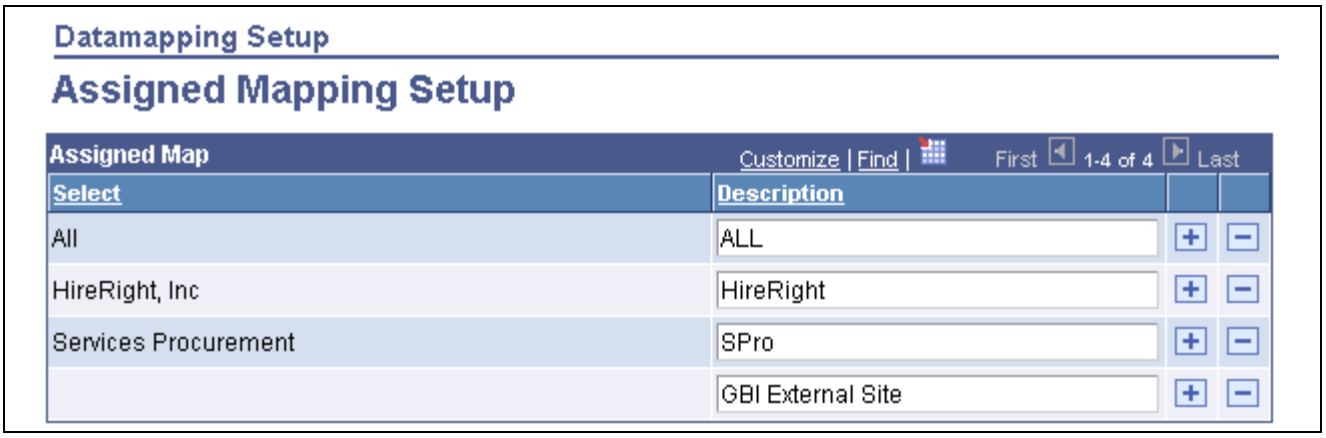
Pages Used to Set Up Data Mapping

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 Assigned Mapping Setup page.

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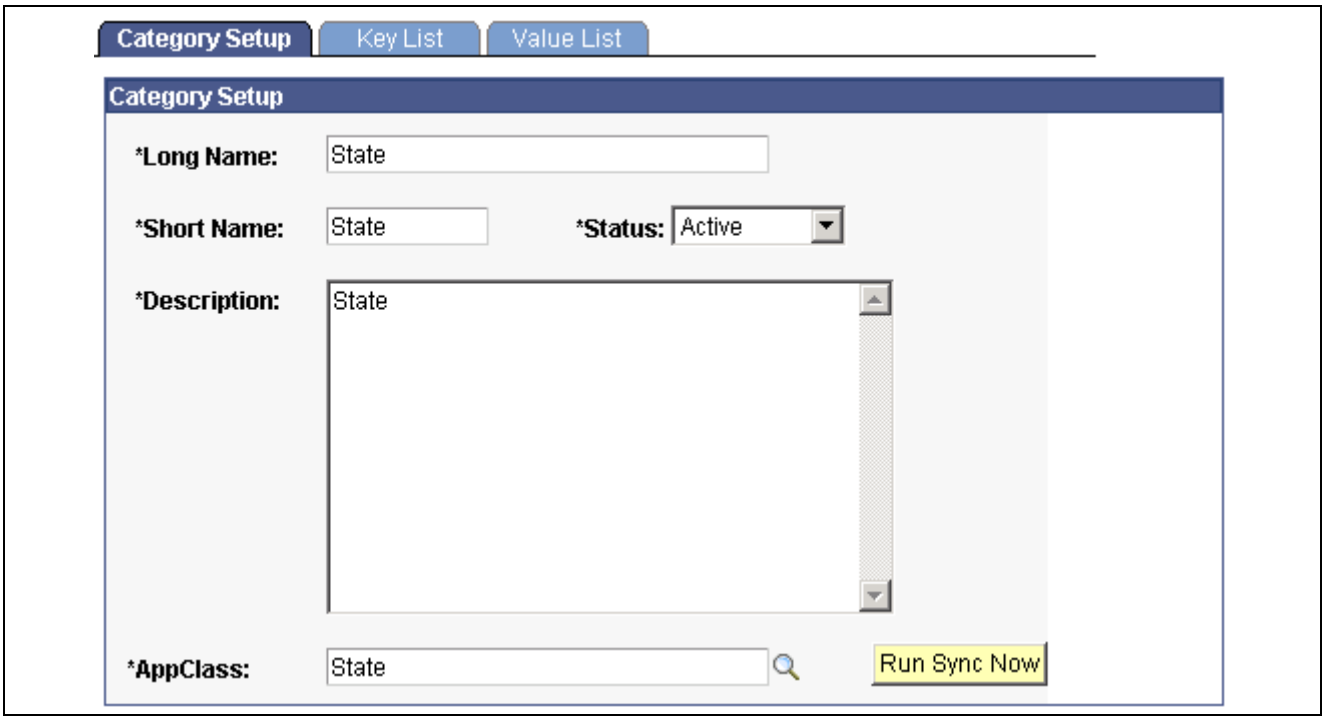
Assigned Mapping Setup page

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.

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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.

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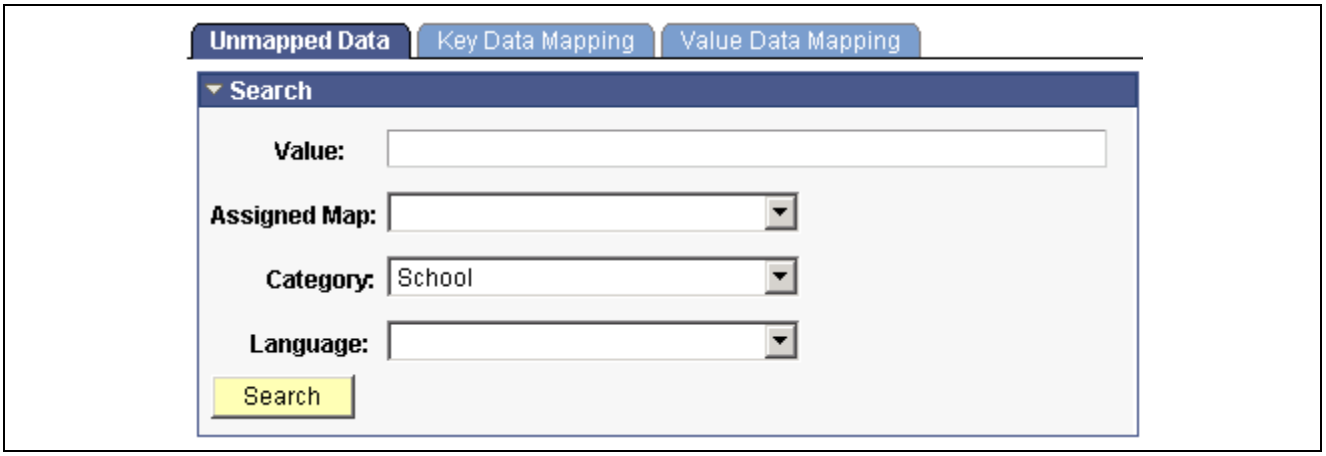


Value List page

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.

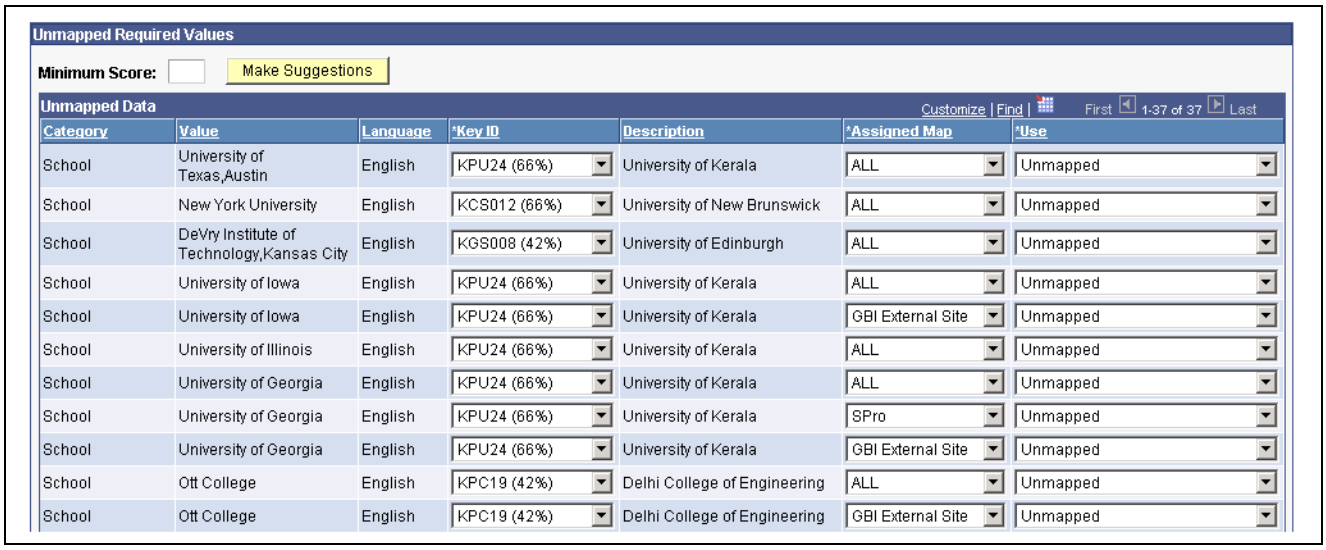
Mapping Unmapped Data

Access the Unmapped Data page.



Unmapped Data page (1 of 2)

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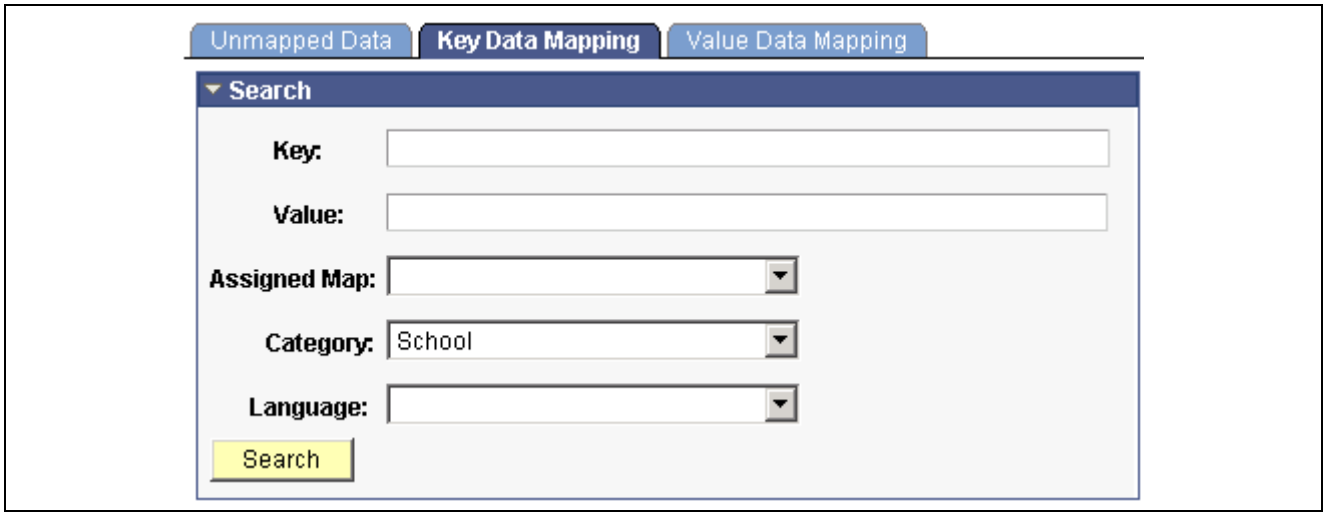
Unmapped Data page (2 of 2)

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.

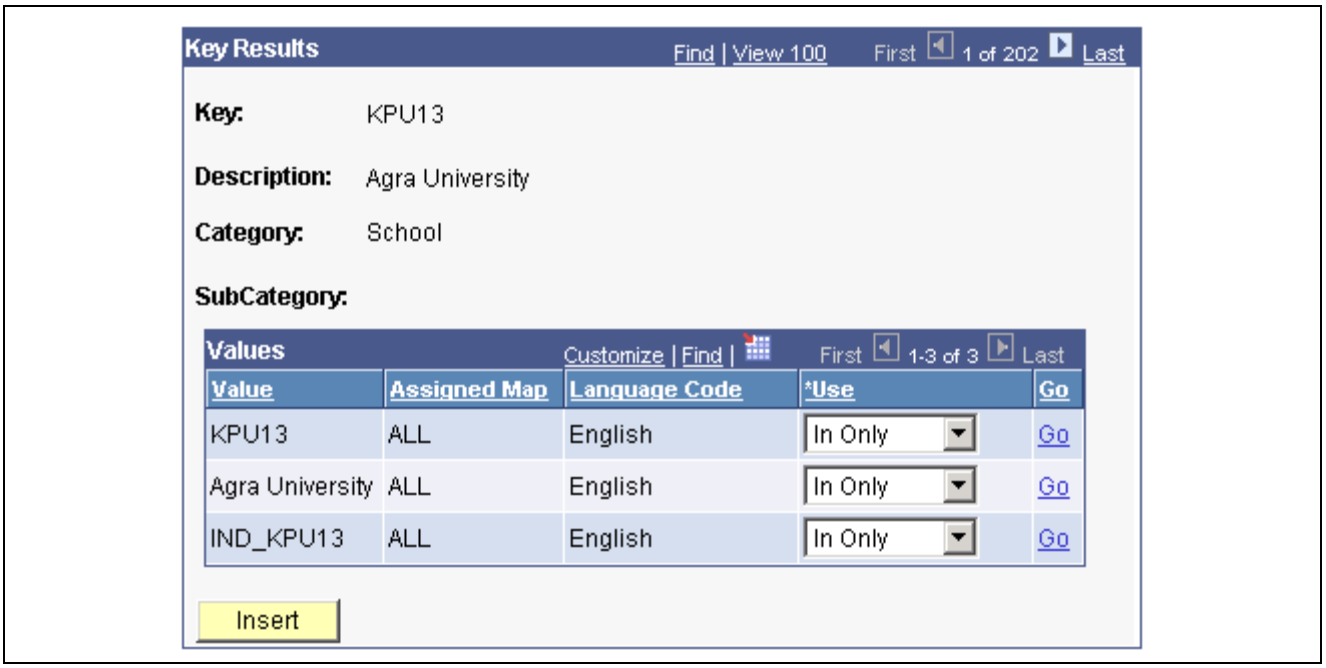
Mapping Keys

Access the Key Data Mapping page.



Key Data Mapping page (1 of 2)

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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

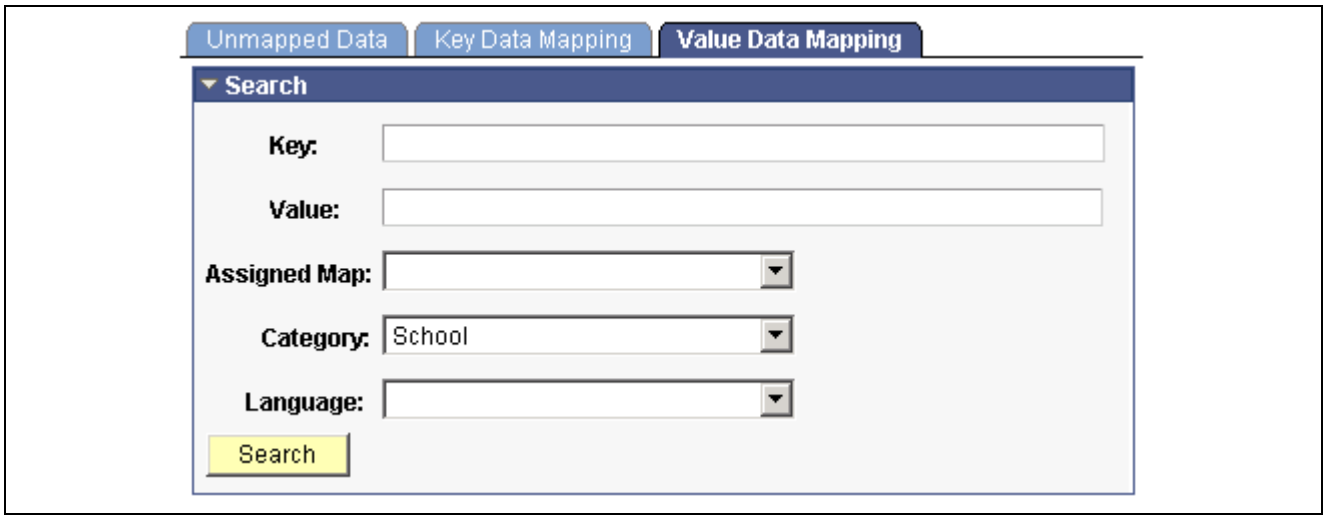
This group box enables you to add other values to the key. The values must be chosen from the unmapped data values.

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.

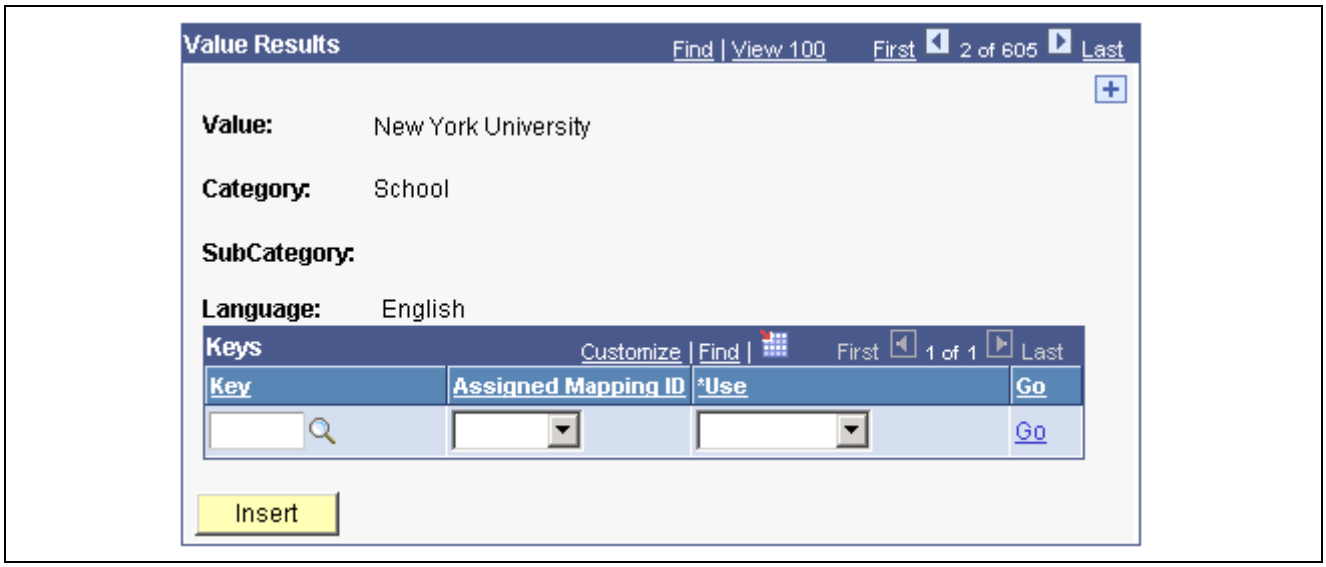
Mapping Values

Access the Value Data Mapping page.

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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.

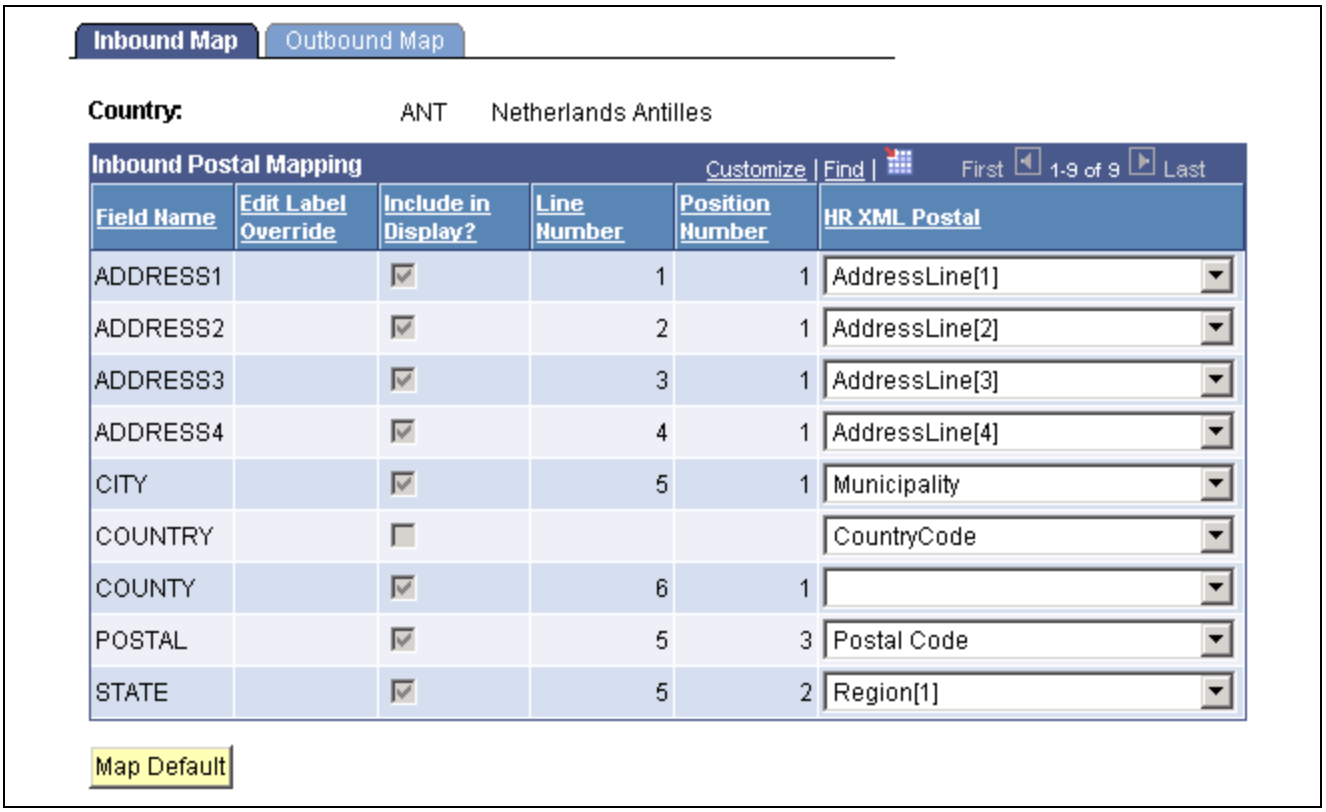
Assigned Mapping ID Select the data mapping assignment that the key is associated with.

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

Mapping Inbound Postal Information

Access the Inbound Map page.

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Inbound Map page

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

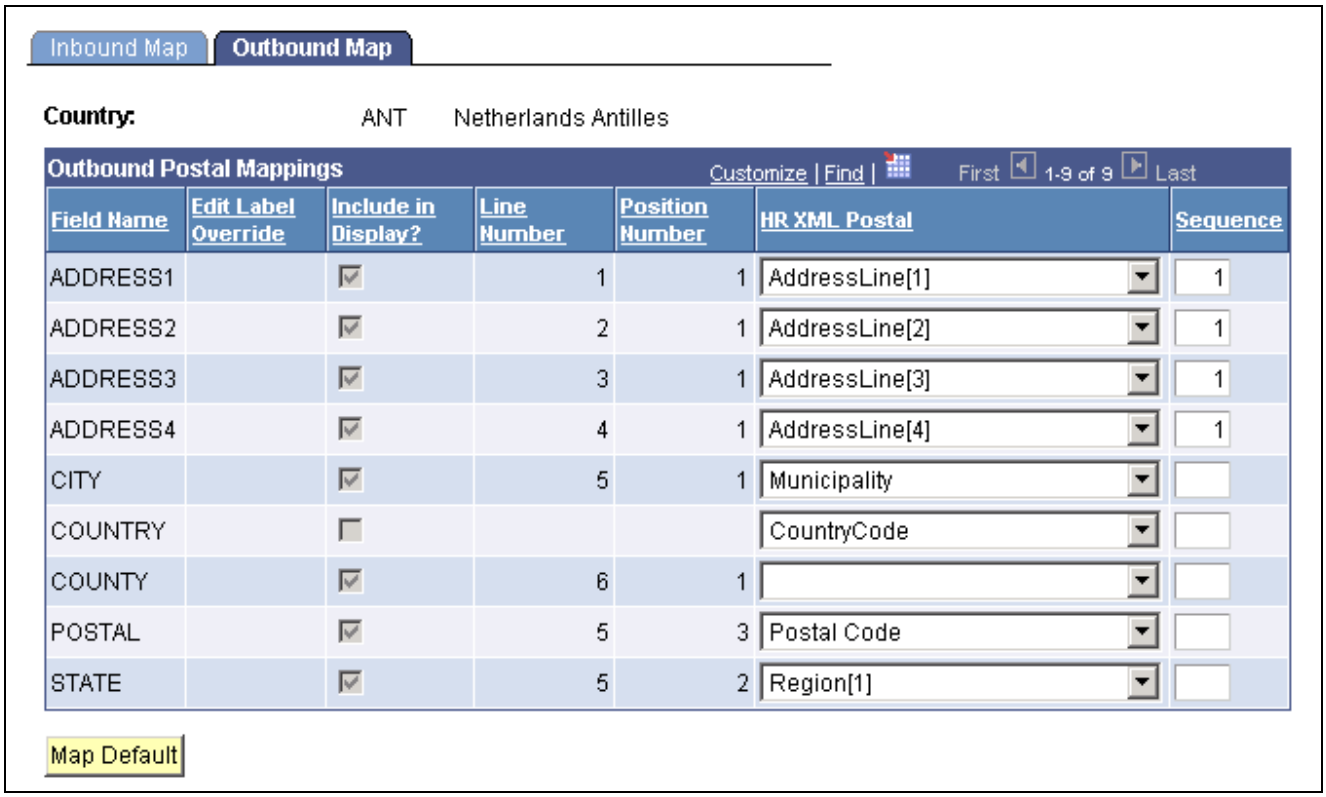
HR XML Postal Select the XML element where you want the corresponding PeopleSoft field to be written for incoming messages.

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.

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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 discusses how to define criteria to automatically screen incoming resumes.

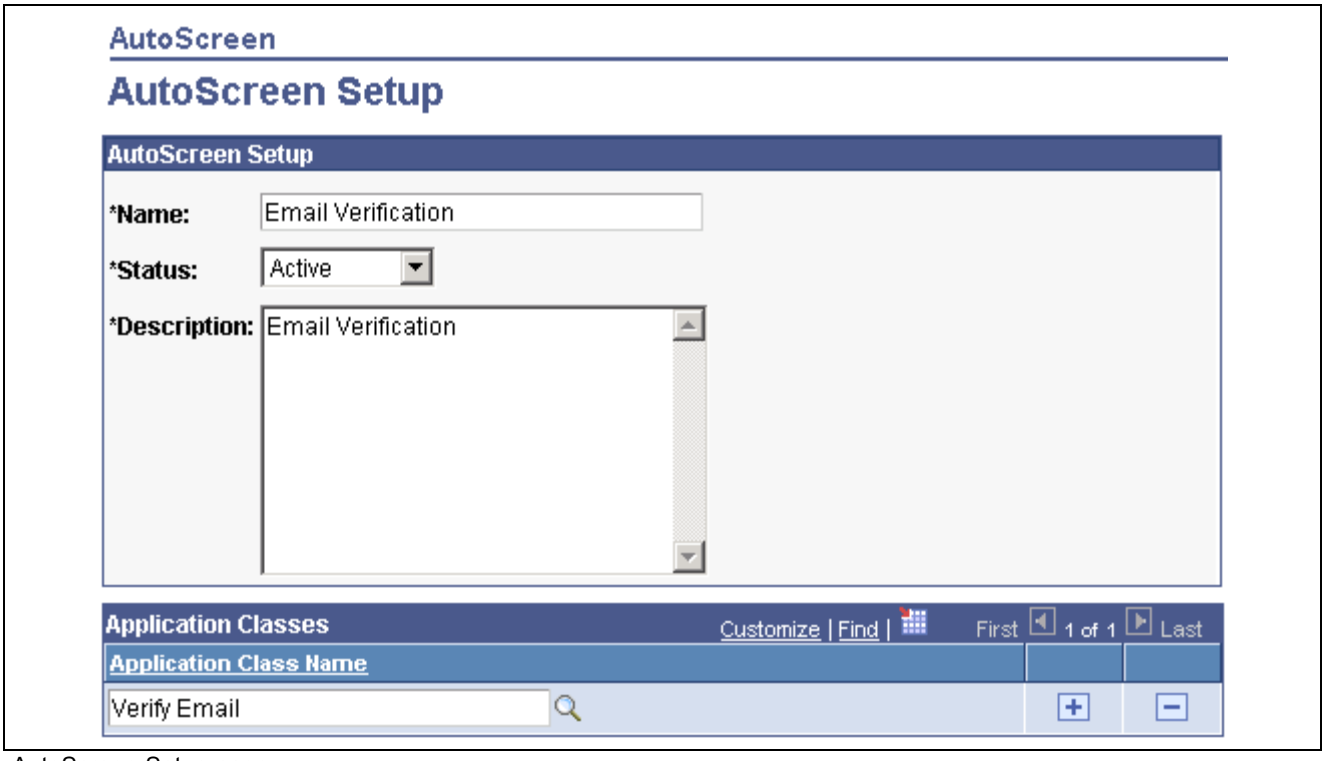
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Page Used to Set Up Autoscreening

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

Defining Criteria to Automatically Screen Incoming Resumes

Access the AutoScreen Setup page.



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.

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- 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.
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.

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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

Before you set up recruitment sources, you must:

- Set up vendors.

  See Chapter 5, "Setting Up Third Party Integrations," Setting Up Recruiting Vendors, page 88.

- Set up sites.

  See Chapter 2, "Setting Up Recruiting Processes," Setting Up Sites, page 12.

- Set up recruitment contacts.

  See Chapter 2, "Setting Up Recruiting Processes," Defining Recruiter Roles, page 17.

- Set up autoscreening criteria for Vendor source types.

  See Chapter 5, "Setting Up Third Party Integrations," Setting Up Autoscreening, page 102.

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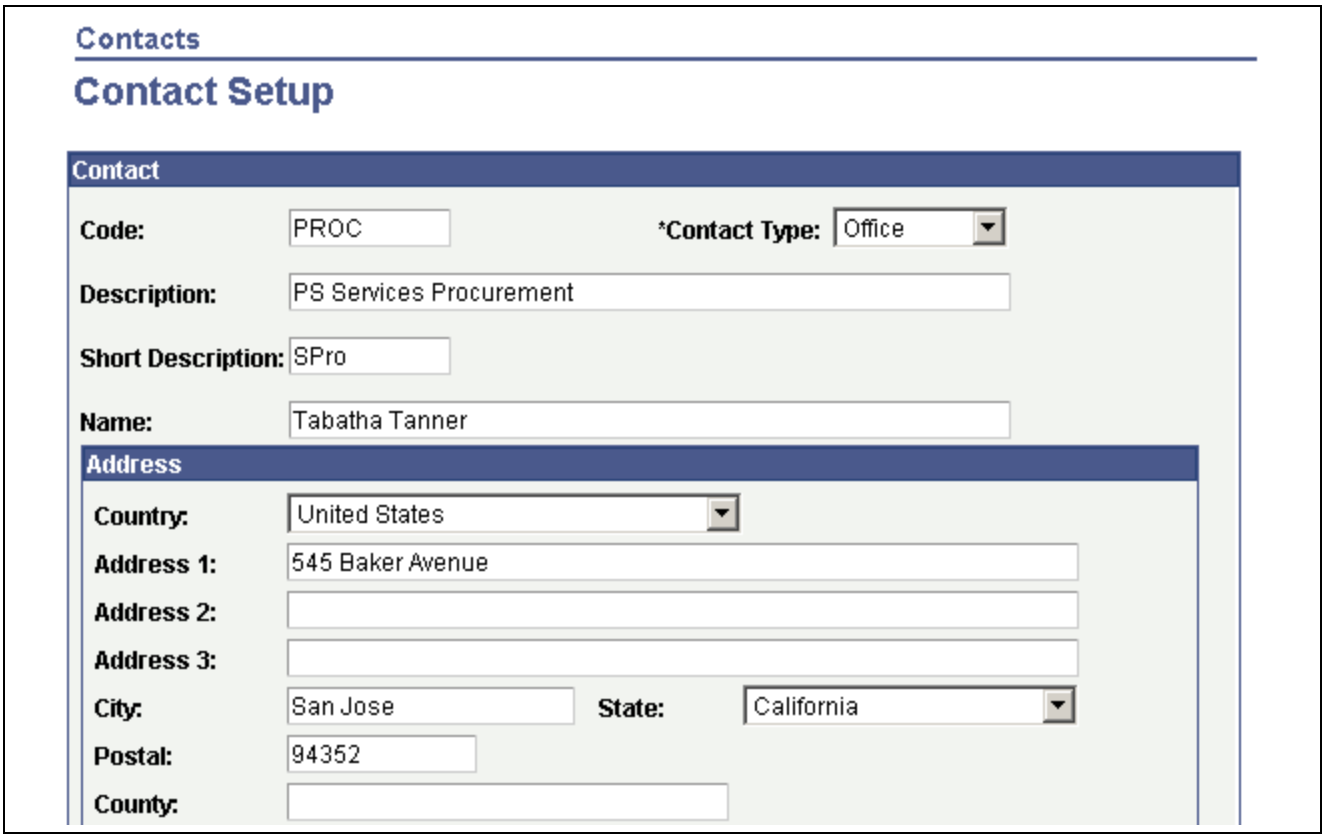
Pages Used to Set Up Recruitment Sources

Page Name	Object Name	Navigation	Usage
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.

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Contact Setup page (1 of 2)



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.

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Telephone

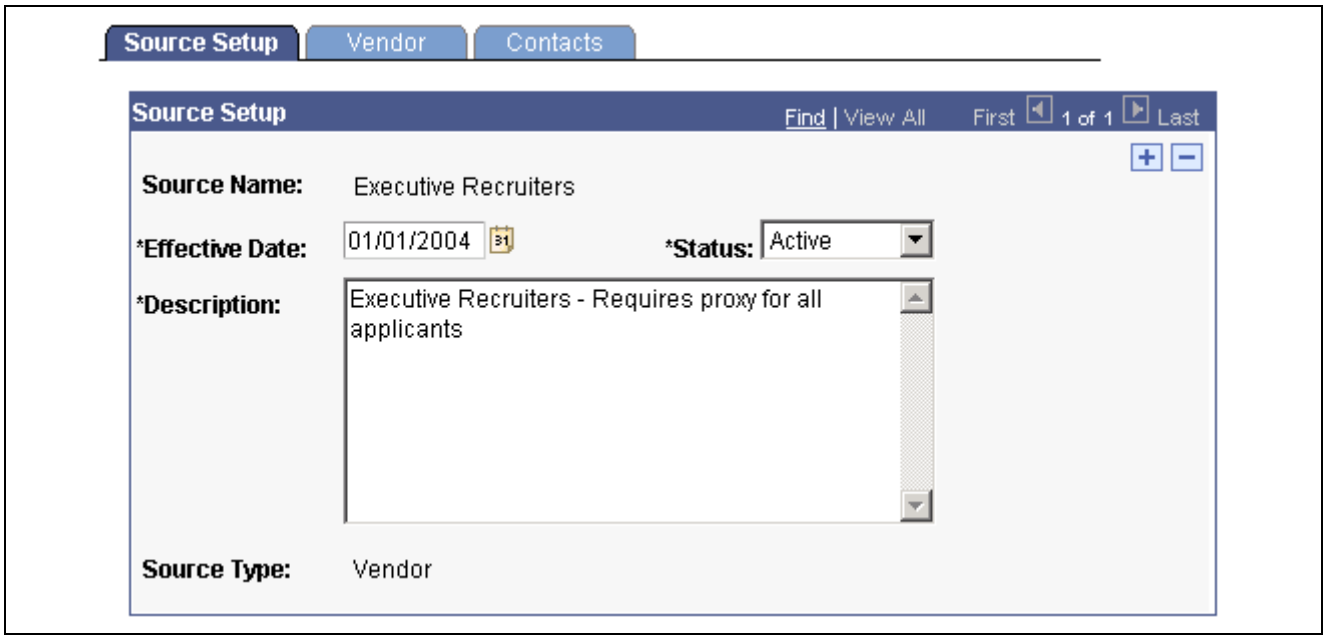
Enter the telephone numbers for this contact.

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.

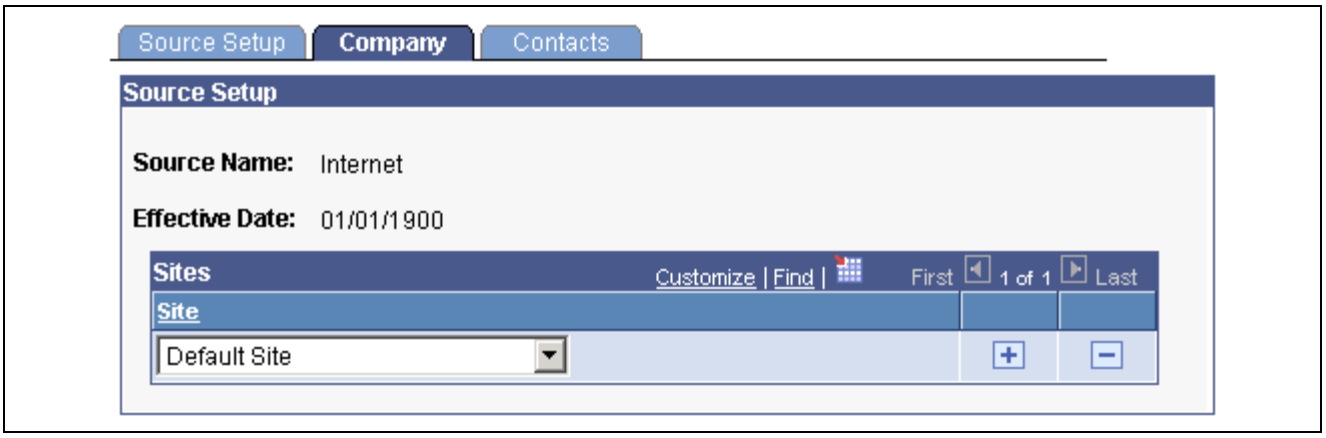
Description Enter a description. This field is used only for informational purposes.

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.

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Company page

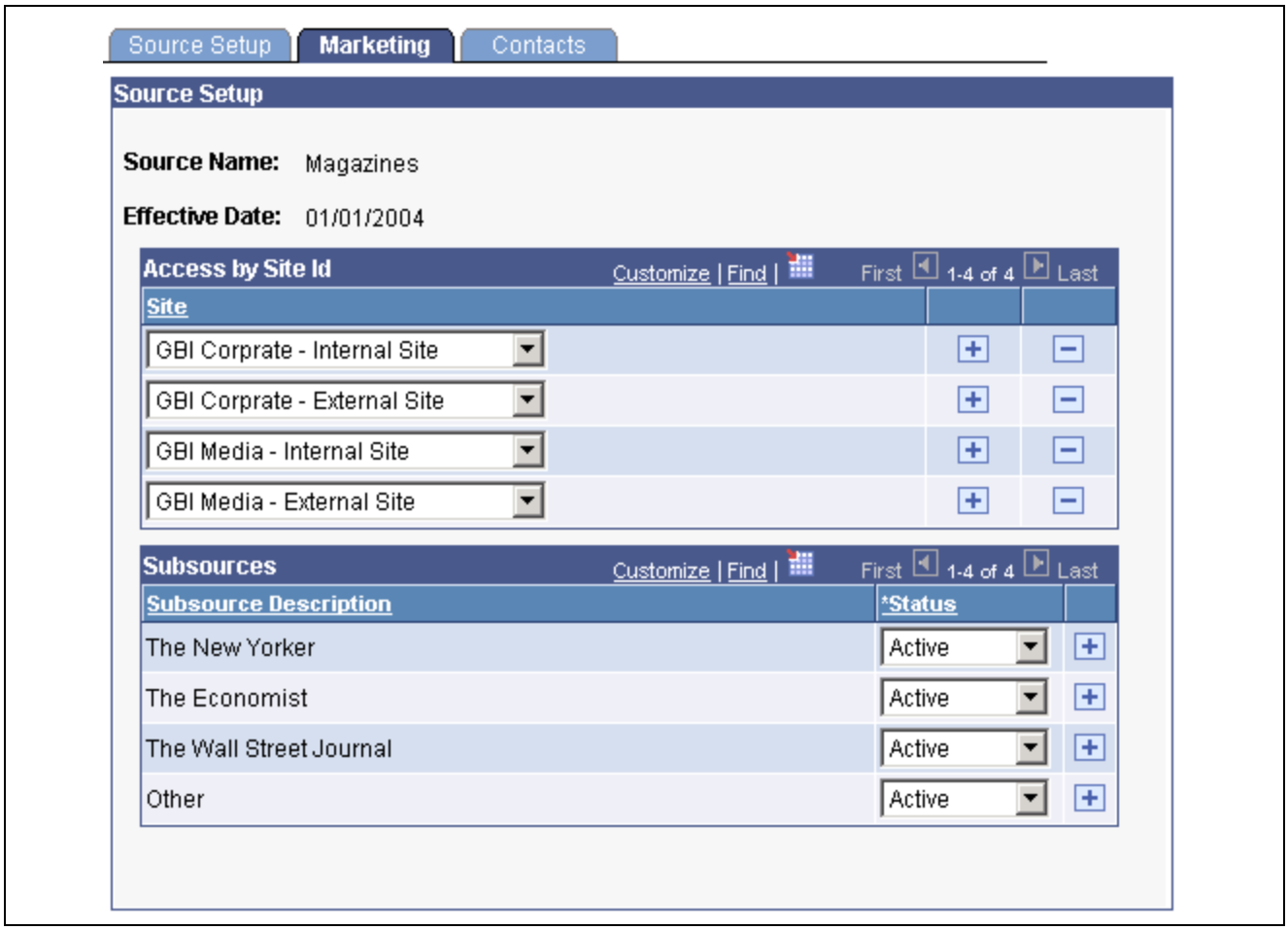
The Company page appears only if you select *Company* in the Source Type field on the Source Setup page.

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.

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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.

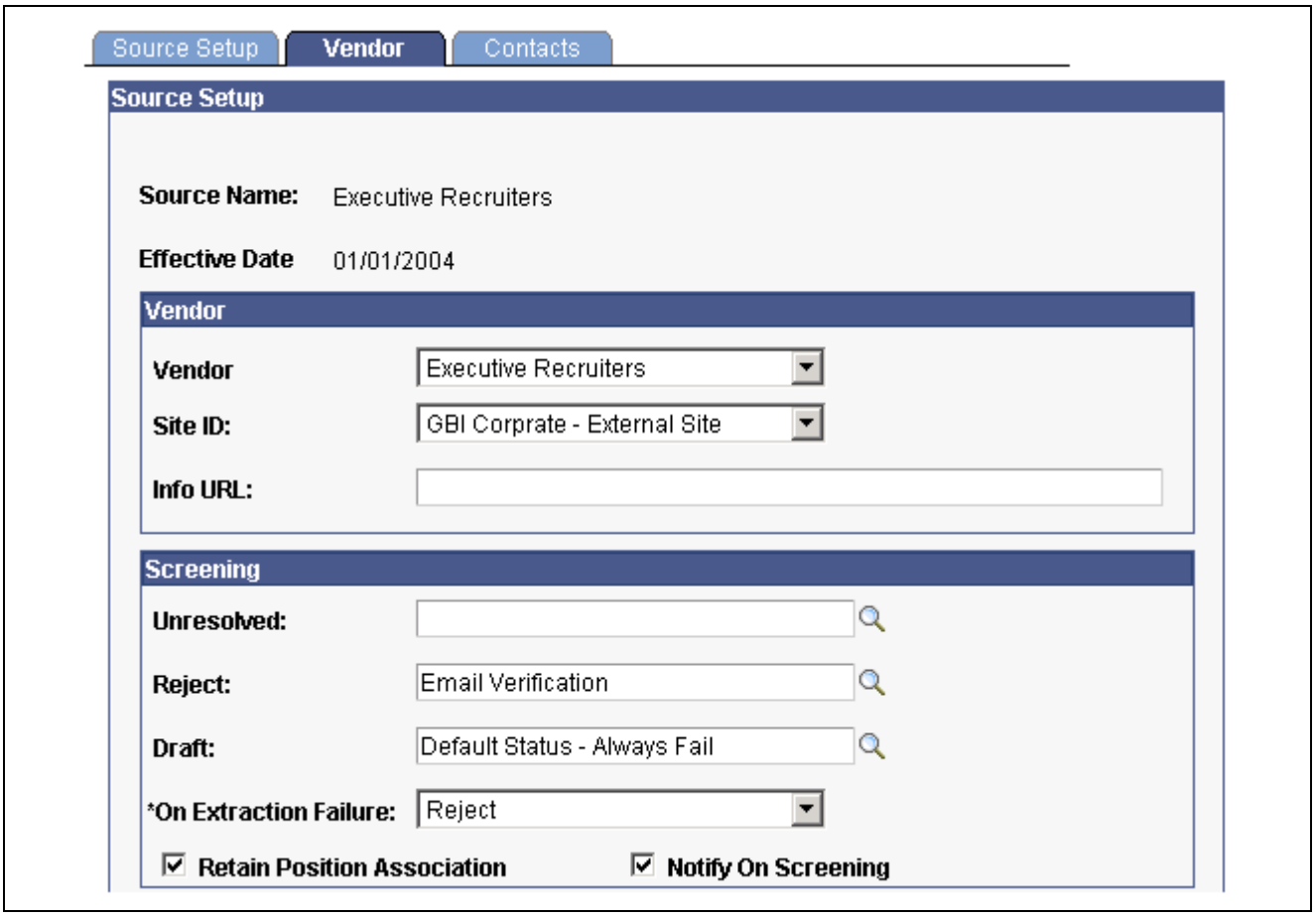
Subsources

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.

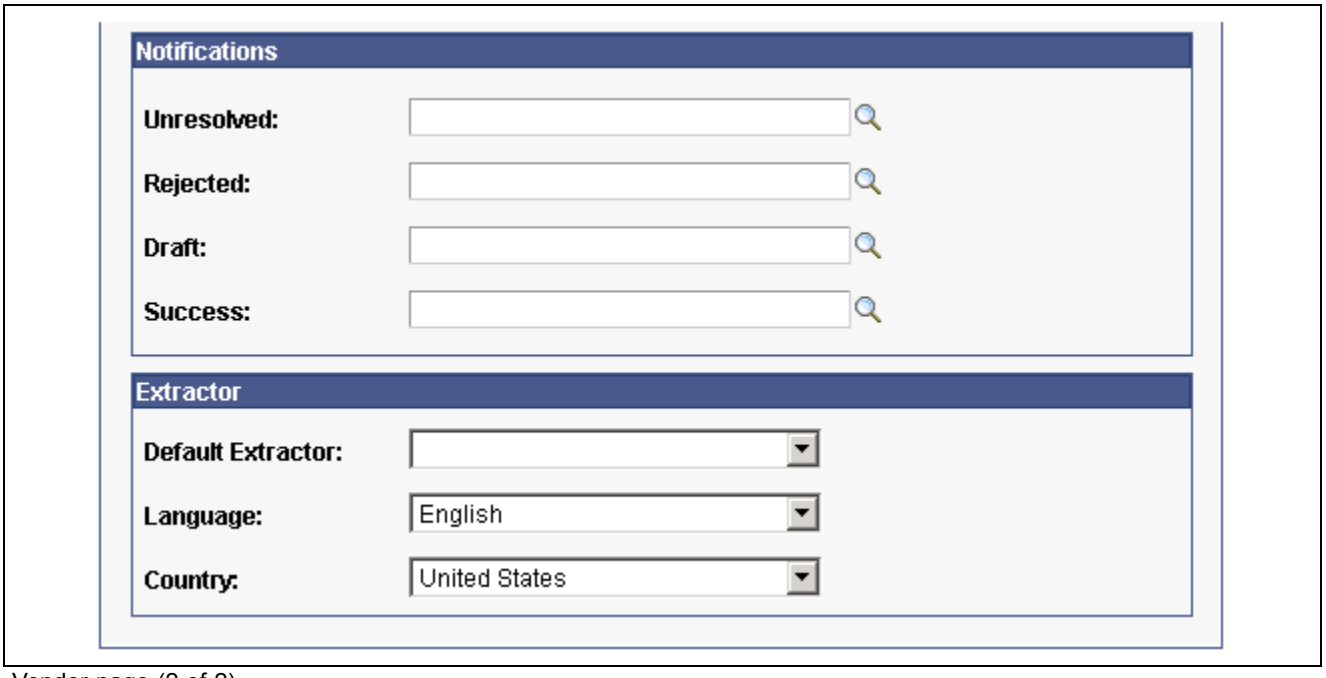
Defining Business Rules for Incoming Resumes

Access the Vendor page.

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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.

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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.

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These are the default values:

Field	Notification
Unresolved	HRS_HROI_UNRESOLVED
Rejected	HRS_HROI_REJECTED
Draft	HRS_HROI_DRAFT
Success	HRS_HROI_SUCCESS

Extractor

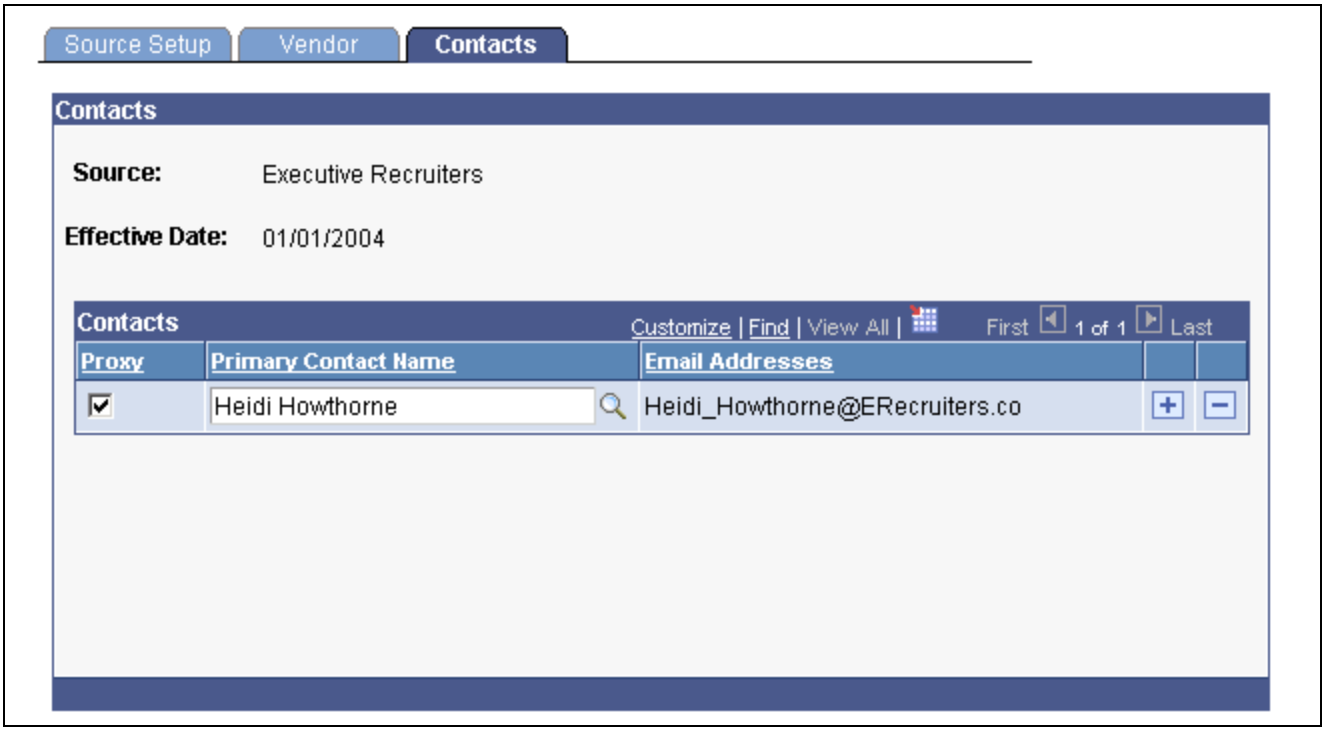
Default Extractor Select the default resume extractor that the system uses for non-XML resumes that come from this source. However, note that you can process resumes through another extractor by using the Manage Resumes (HRS_AL_LOG) component.

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

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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 88.

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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 103.

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 PeopleBook: PeopleSoft Process Scheduler, "Submitting and Scheduling Process Requests"*

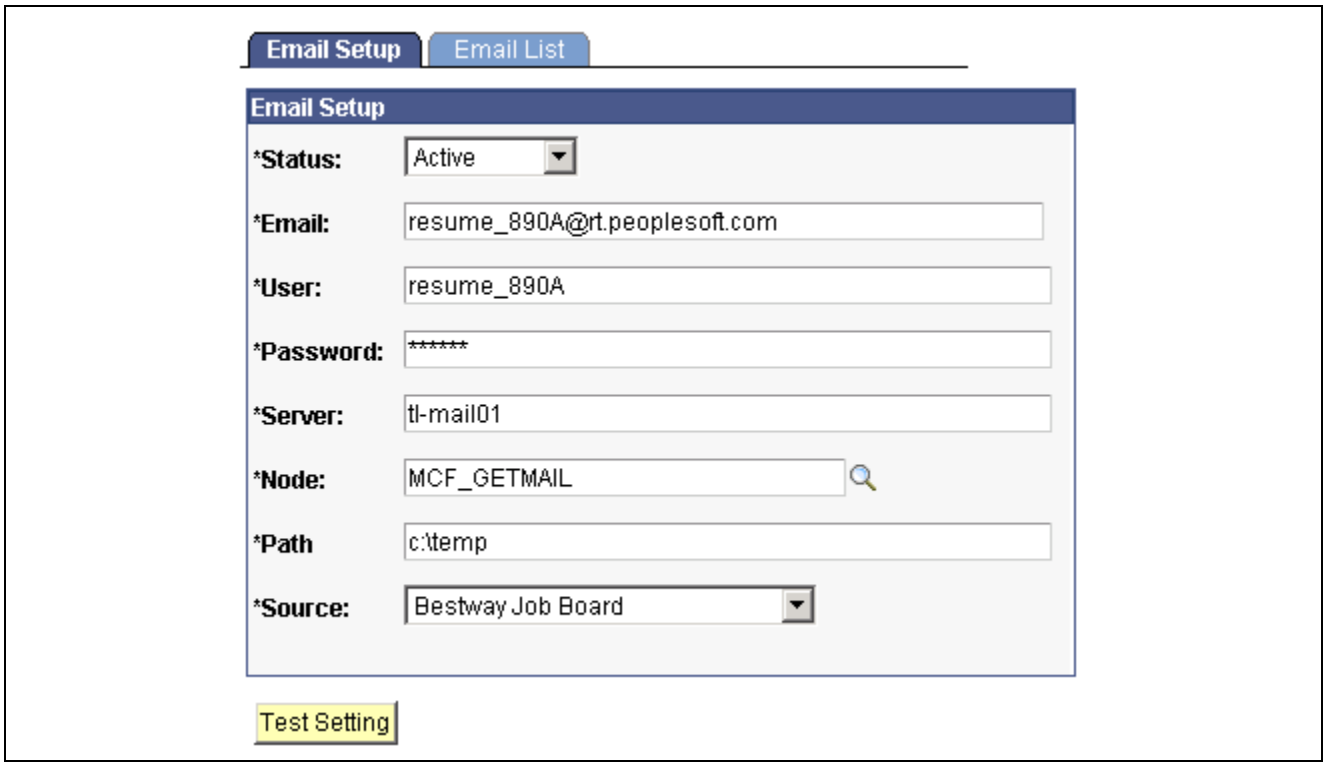
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Pages Used to Define Resume Email Accounts‘

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.

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

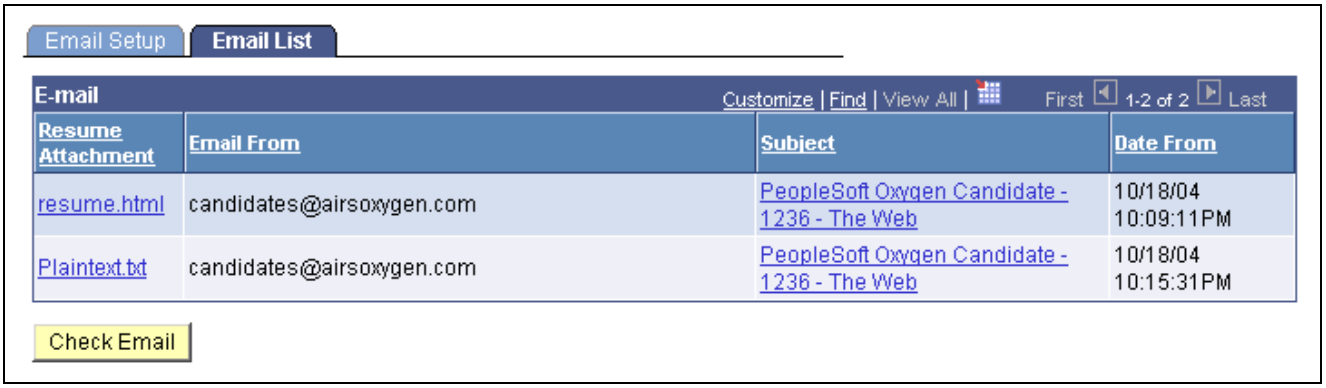
Path Enter the path where the email node stores email attachments. By default, the value that you specify for the MCF_AttRoot property on the Connectors page appears here.

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

Email

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

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

Email From Displays the email address of the sender.

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

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

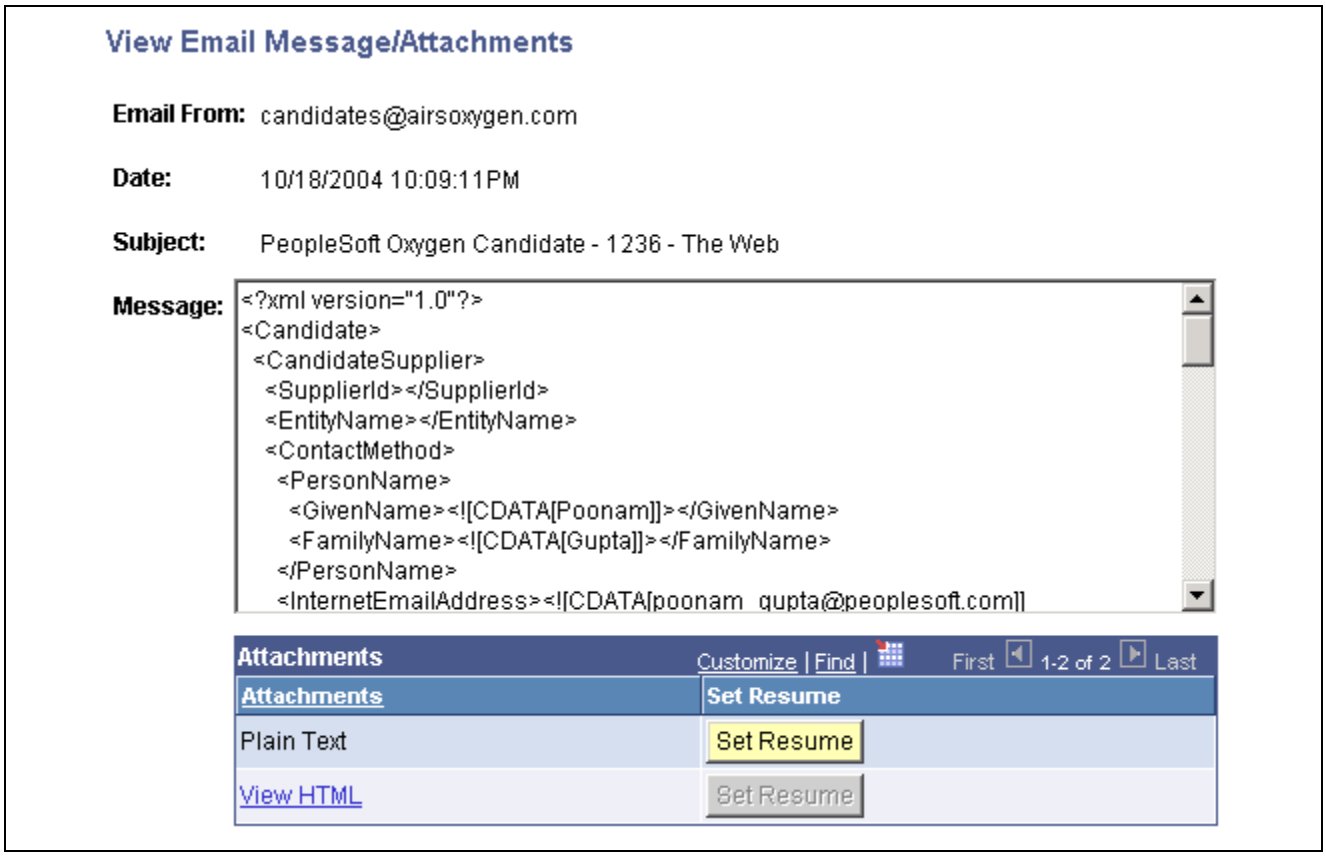
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Additional Page Element

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.

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Reviewing the Integration Transaction Log

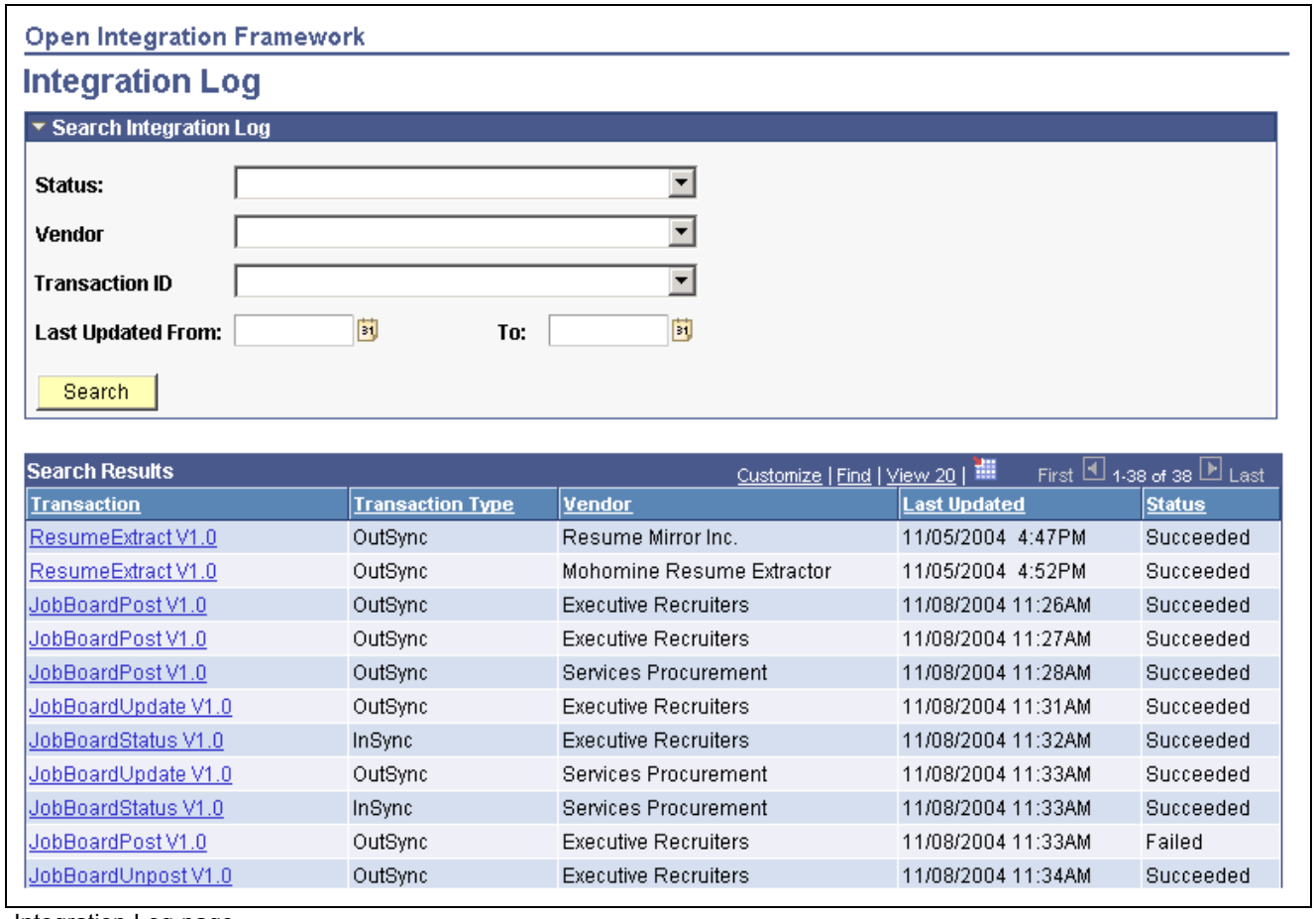
This section discusses how to review the integration transaction log.

Pages Used to Review the Integration Transaction Log

Page Name	Object Name	Navigation	Usage
Integration Log	HRS_HROI_LOG	Set Up HRMS, Product Related, Recruiting, Integration, Integration Log, 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 Integration Log page.



Integration Log page

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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.

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CHAPTER 6

Creating Job Openings

This chapter provides an overview of how job openings are created and discusses how to:

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

Understanding How Job Opening are Created

There are three methods by which job openings can be created. Recruiters, recruitment administrators, and managers can use:

- The Create a New Job Opening (HRS_JO_LAUNCH) component to enter job opening information.
- The Create Job from Position (HRS_CRJOB) process to create job openings from open positions.
- The Clone Job Opening (HRS_JO_CLONE_SEC) component to create a new job opening by copying an existing one.

Regardless of the method you use to create job openings, job opening information is broken down into the following areas:

- Basic job information.
- Staffing information.
- Salary Information.
- Competencies and accomplishments.
- Screening criteria.
- Recruitment teams
- Job posting information

Basic Job Information

Basic job information refers to data such as:

- How many openings are to be filled?
- Where is the job located?
- What is the job code or position number?
- Where does the job fit in the organization's structure?

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Staffing Information

Once you have provided the job code, position ID, or both the system automatically displays much of the associated staffing information. Much of this information can be used later as screening criteria.

Salary Information

Just as with the staffing information, once you have provided the job code, position ID, or both the system automatically displays much of the associated salary information. Much of this information can be used later as screening criteria.

Work Experience, Education, Competencies, and Accomplishments

This area defines what requirements are expected from someone who fills this job opening. This information can be used as screening criteria.

Competencies and accomplishments can be automatically populated from the job profile, if you have selected Job Profile in the Template Segmenting Type on the Recruiting Installation - Installation Options page and selected a value in the Load Rqmts from Job Profile field on the Recruitment Template page. The system looks for a profile type of JOB and profiles within that profile type, with the job codes, or job families, or positions, or salary grades, that match the job opening that you are creating.

Screening Levels and Criteria

Screening levels are defined on the Screening Definition page. They define the rules by which the system processes the screening level. Screening levels are linked to a screening template, which in turn is linked to a recruitment template, and is used when a job opening is created. You can add or delete the screening levels associated with the job opening.

Screening criteria defines the specific job requirements used by the system to compare an applicant's qualifications to those of the job opening for the specified screening level.

This table summarizes the 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

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Job Opening Field	Applicant Field
(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.

Note. Remember that these screening questions are only available to those applicants that apply online.

Recruitment Team

You define the recruiter, hiring manager, interview team, and any interested parties. This allows these employees access to the job and applicant data.

Job Posting Details

Job posting information consists of the posting title, one or more posting description types, and one or more posting destinations.

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Prerequisites

Before you begin to create job openings, complete the following tasks:

1. Decide whether you want job openings to go through an approval process.

   Newly created job openings can go through an approval process regardless of the method you use to create job openings. Recruiting Solutions uses the JobOpening approval process defined on the Setup Process Definition page. Use the Recruiting Installation - Installation Options page to activate approvals.

2. If your job openings are managed by works council committees, then activate work councils on the Recruiting Installation - Installation Options page.

See Chapter 2, "Setting Up Recruiting Processes," Setting Up Talent Acquisition Manager Implementation Defaults, page 7.

Creating Job Openings

This section provides an overview of how to create job openings using 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 levels.
- Add screening criteria to screening levels.
- Define competency points.
- Add job posting details.

Understanding How To Create Job Openings

When you create a new job opening, you have the option of creating either a:

- Continuous job opening - which 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 Performance Management, continuous job openings are not used in time to fill reporting.

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

  They require specific data regarding the job or position code.

The basic information you first enter about the job opening and the segmenting value entered in the Template Segmenting Type field on the Recruiting Installation - Installation Options page is used to identify which job opening template to use and pull in default information for the job opening.

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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 the system cannot find a template that matches the segmenting type, it uses the default template defined on the Recruiting Installation - Installation Options page.

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 the job opening information is entered, you can either save it as a draft or submit the job opening for approval. 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 approvals is active.

  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 approvals is not active.

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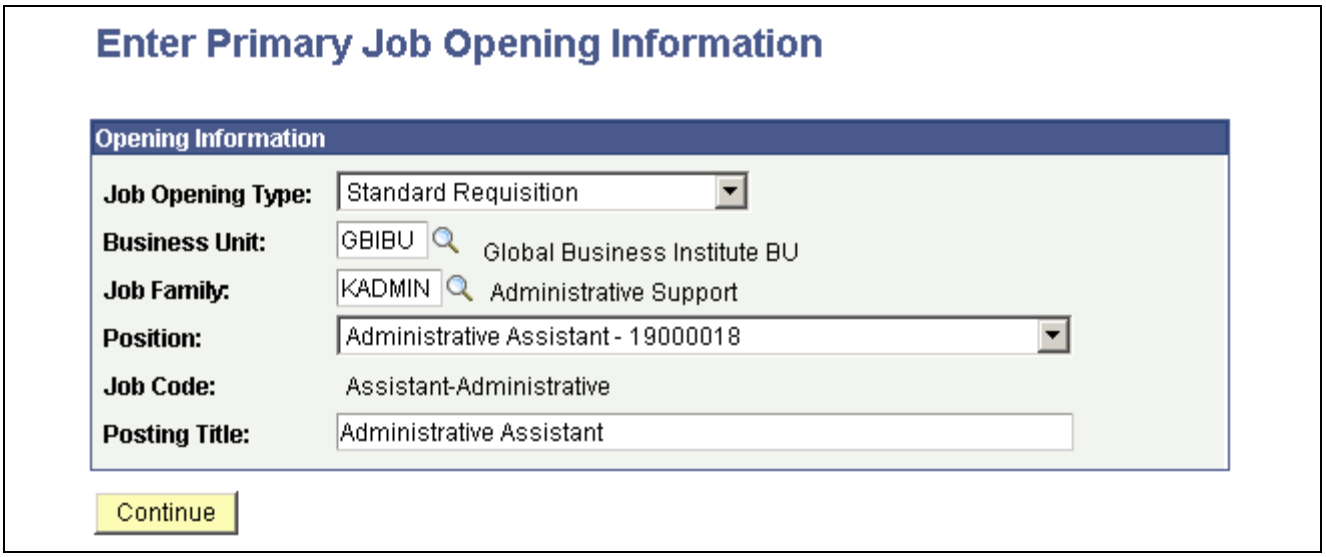
Pages Used to Create Job Openings

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.
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.
Add Screening Levels	HRS_SCR_ADD_SEC	Click the Add Screening Options link on the Job Opening page.	Add screening levels to the job opening.
Job Opening Screening Criteria	HRS_JO_SCR_DTL	Click the screening level link in the Applicant Screening group box on theJob 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 Screening Criteria page.	Define competency points.
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.

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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 This field appears when the Template Segmenting Type field on the Recruiting Installation - Installation Options page is set to *Company.*

Select the company associated with the job opening.

Department This field appears when the Template Segmenting Type field on the Recruiting Installation - Installation Options page is set to *Department.*

Select the department associated with this job opening.

Position This field appears when Position Management Option on the HRMS Options page is set to *Full* or *Partial.*

Select the position number associated with the job opening.

This field is optional.

Job Code This field appears when Position Management Option on the HRMS Options page is set to *None* or *Partial.*

Select the job code associated with this job opening.

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.

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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.

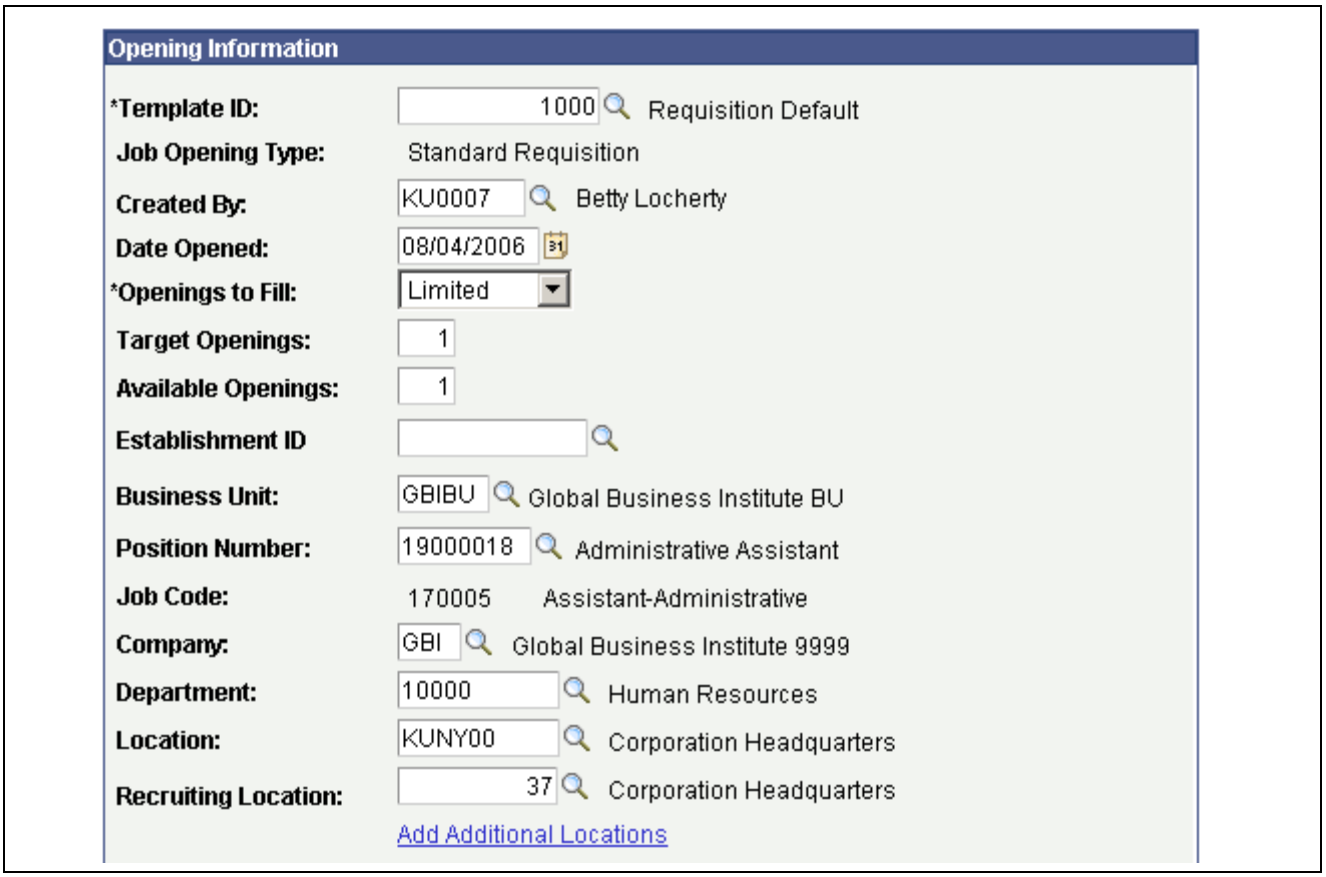
Entering Job Opening Details

Access the Job Opening page.

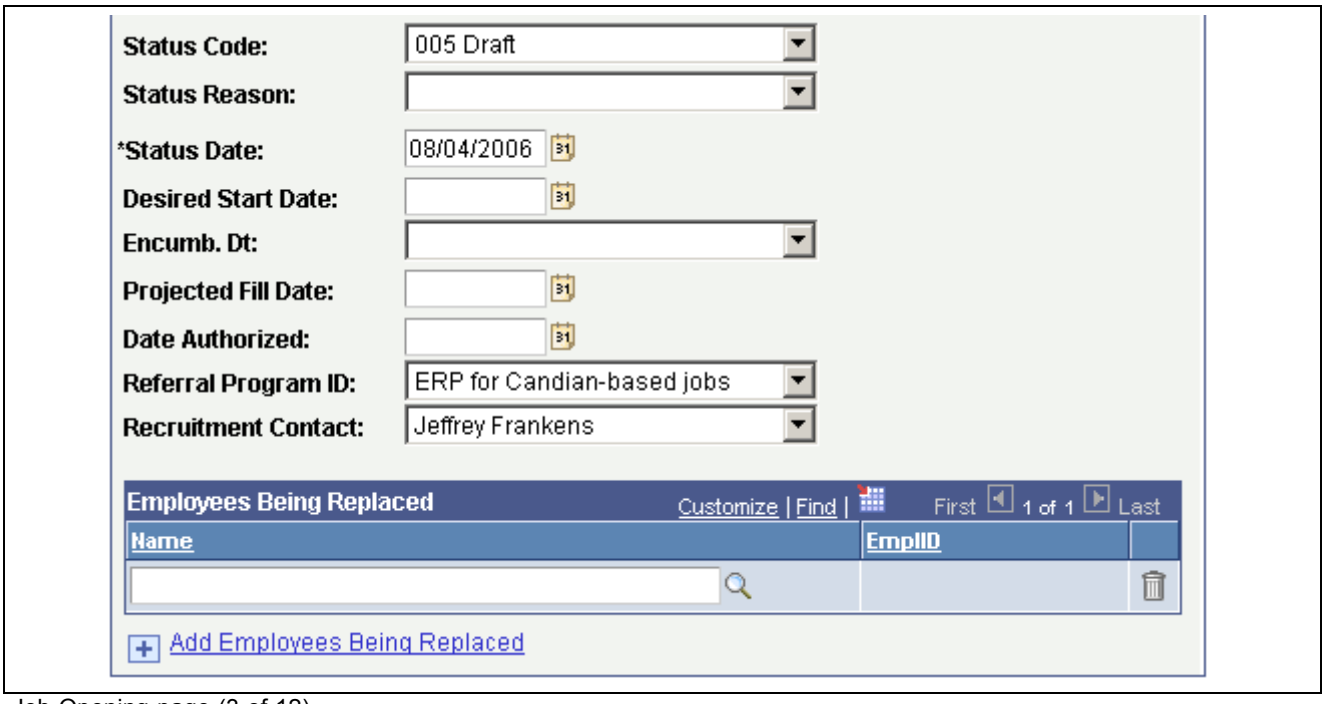


Job Opening page (1 of 12)

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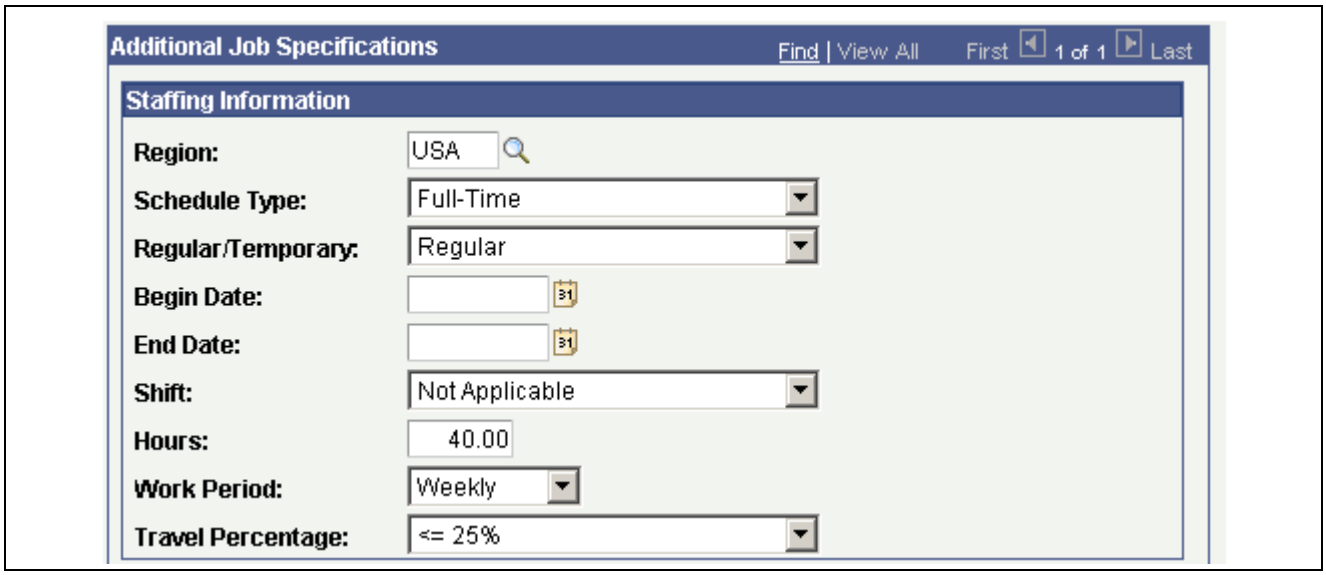


Job Opening page (2 of 12)

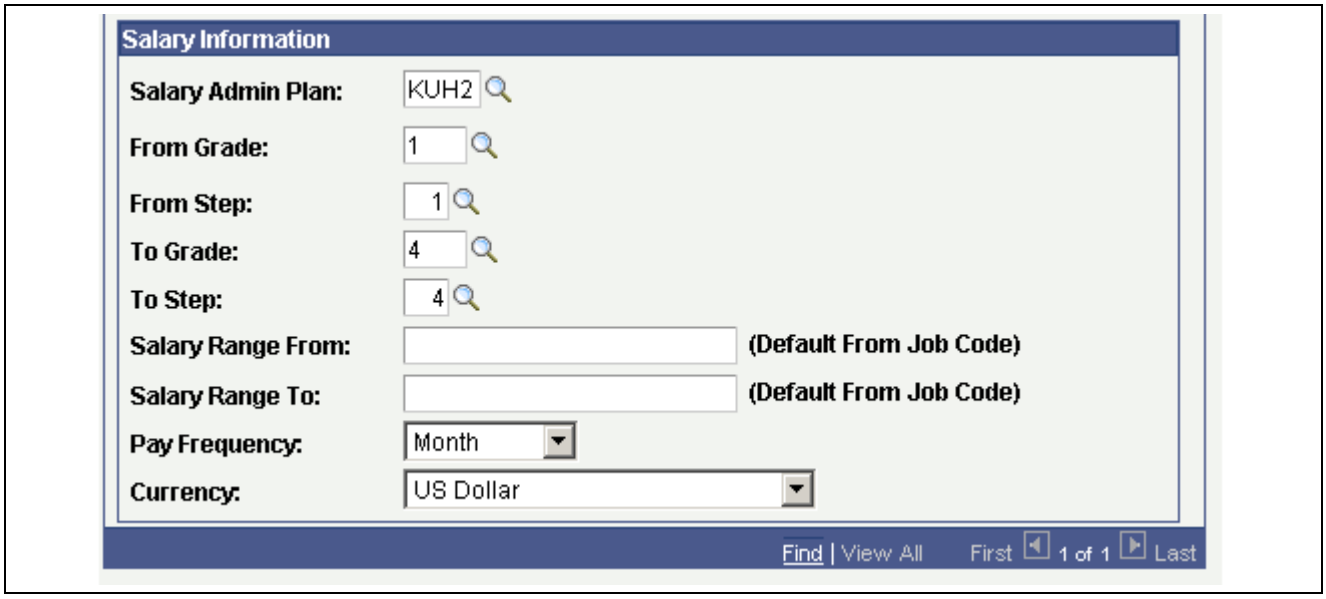


Job Opening page (3 of 12)

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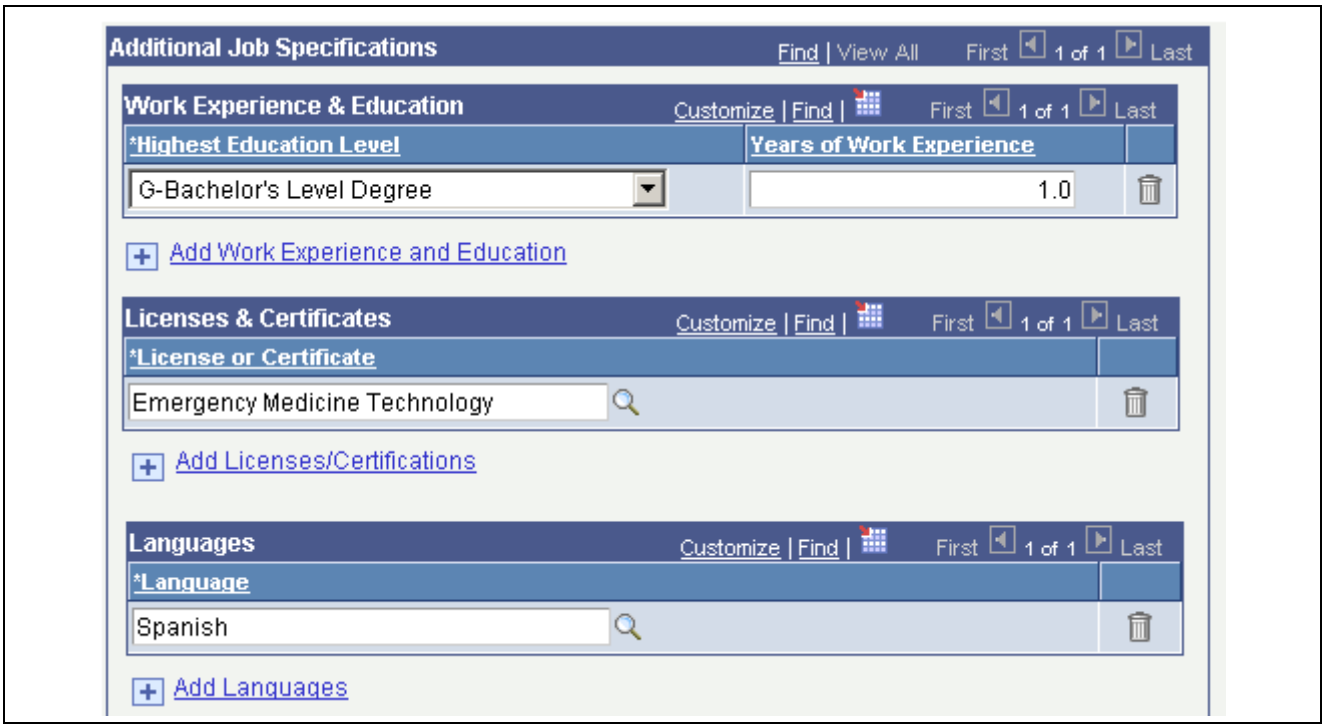


Job Opening page (4 of 12)

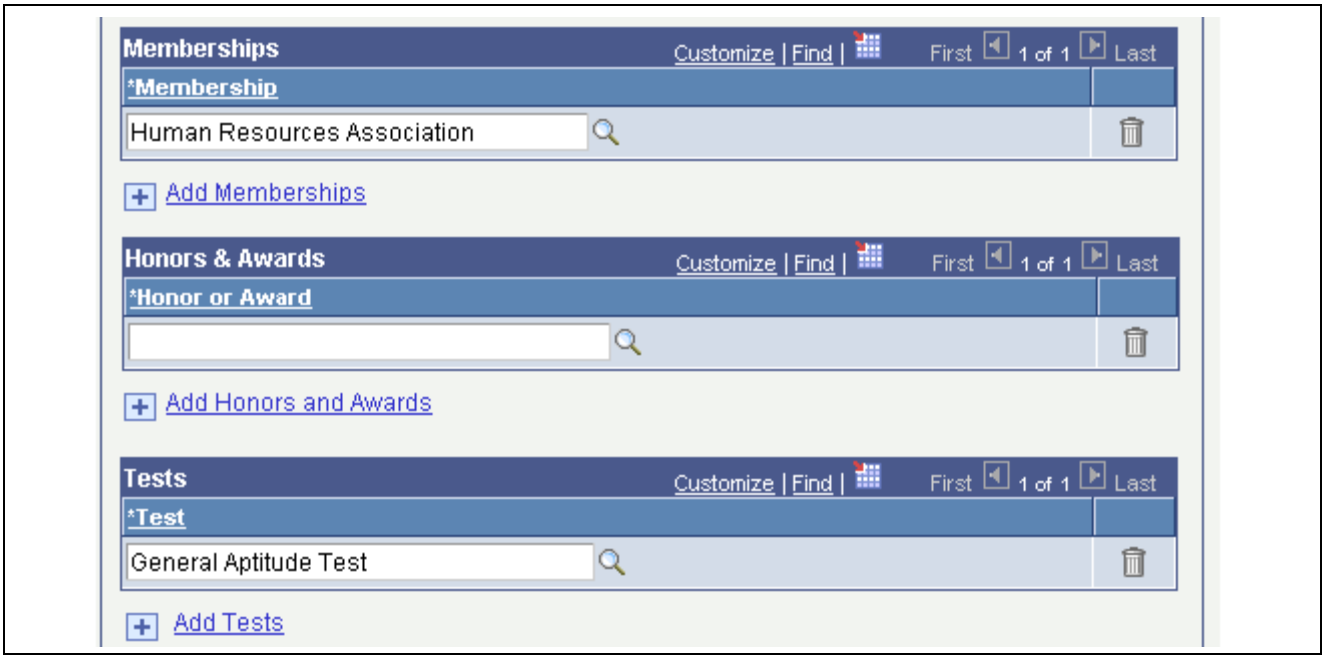


Job Opening page (5 of 12)

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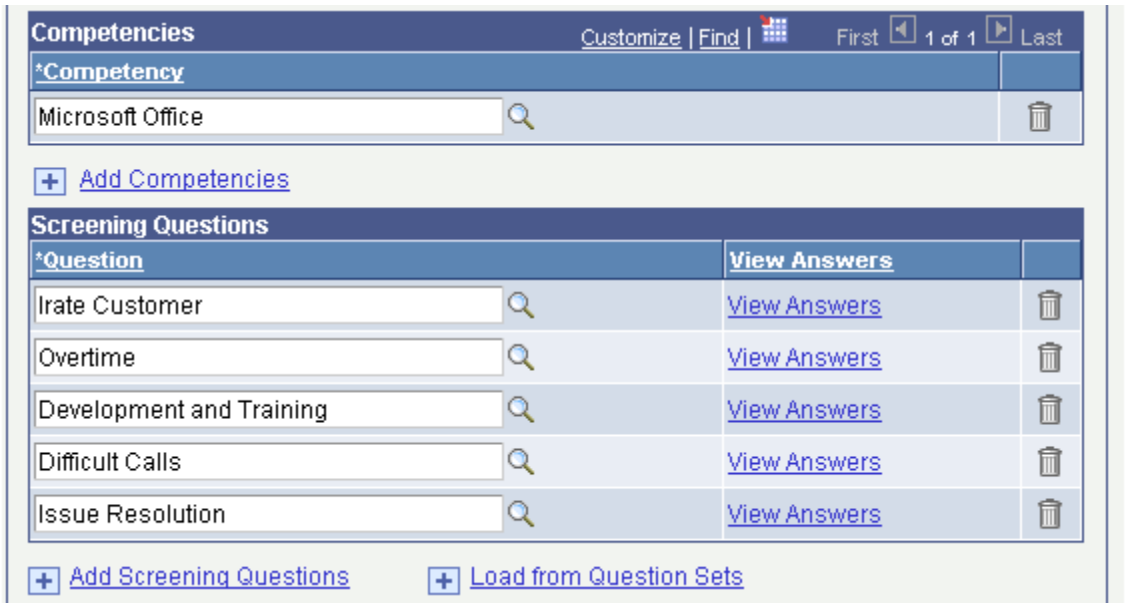


Job Opening page (6 of 12)

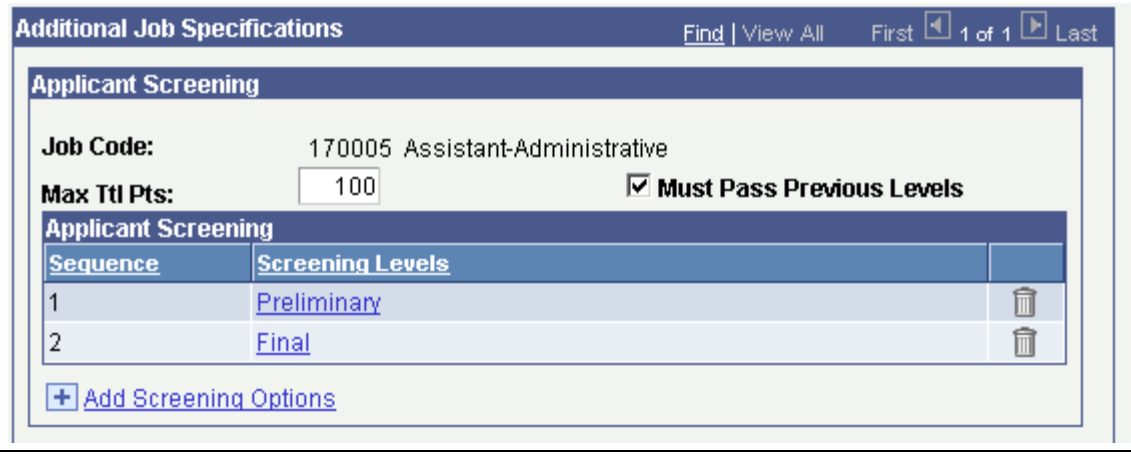


Job Opening page (7 of 12)

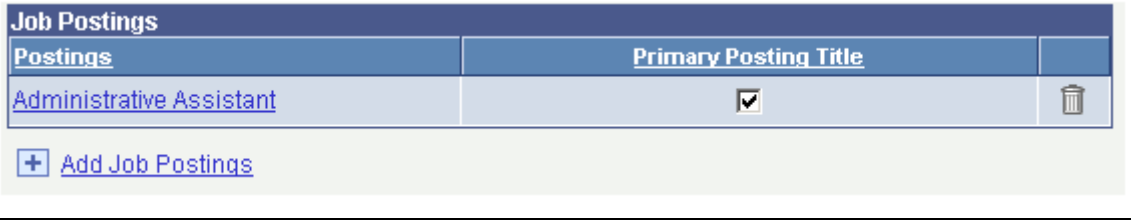
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Job Opening page (8 of 12)



Job Opening page (9 of 12)

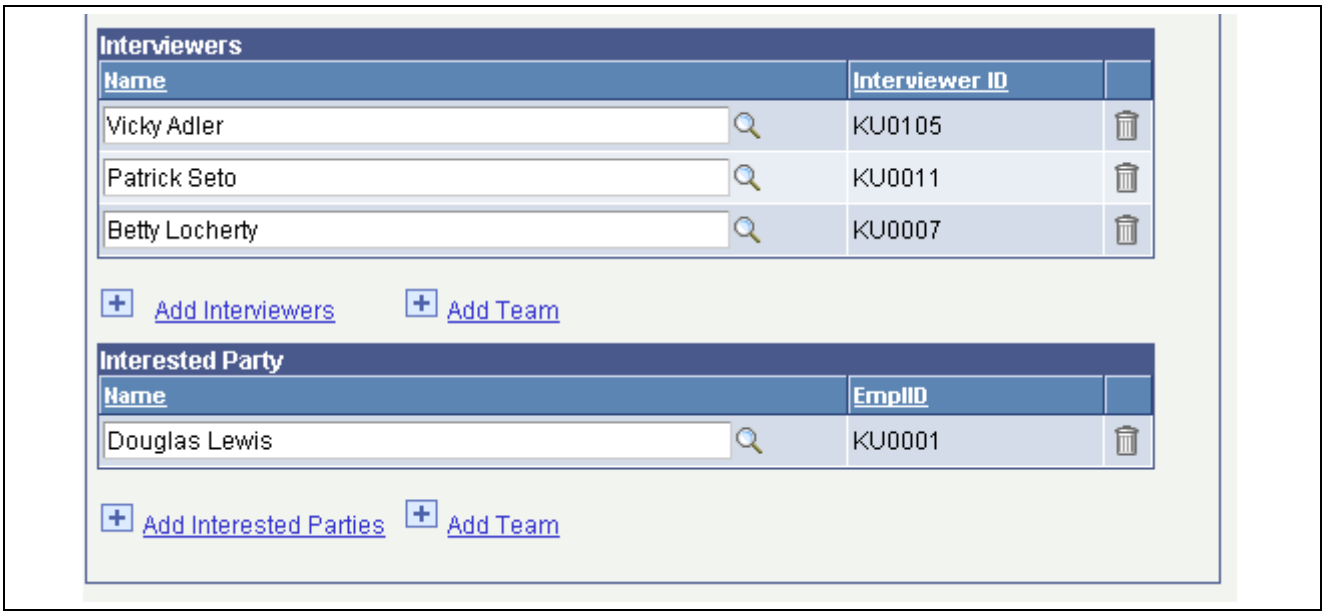


Job Opening page (10 of 12)

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Job Opening page (11 of 12)



Job Opening page (12 of 12)

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

This field displays for users in the administrator role.

Select the template 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.

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See Chapter 2, "Setting Up Recruiting Processes," Setting Up Talent Acquisition Manager Implementation Defaults, page 7.

See Chapter 3, "Setting Up Recruiting Templates," Assigning Segmentation Values to Recruitment Templates, page 63.

Job Opening Type Displays the type of job opening selected on the Enter Primary Job Opening Information page.

Created By Enter the employee ID for the person you want assigned to the creator role for this job opening.

The value defaults to the ID of the user that initiated the creation of the job opening.

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.*

The total *Available Openings* should be less than or equal to the *Target Openings*.

Establishment ID Select the Establishment ID for this job opening.

The value defaults to the ID assigned to the job code or position ID.

Business Unit Select a business unit. The default value is the value that you entered on the Enter Primary Job Opening Information page.

Position Number Select a position number. This field defaults to the value 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.

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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 6, "Creating Job Openings," Adding Locations to Job Openings, page 143.

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.

(USF) Recruitment Type Defines whether the job opening is:

- *Internal* - only current federal employees.
- *Merit Promotion* - current and previous federal employees.
- *Open Competition* - internal and external applicants.

(USF) Area of Consideration Defines where the job opening is to be available:

- *Agency*

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- *External Government*
- *Federal Government*
- *Nationwide*
- *Subagency*
- *Worldwide*

Recruitment Contact Select a recruitment contact. Recruitment contacts are defined on the Recruitment Contacts page and must have a recruitment type of *Office.*

(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.

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The Priority Placement process uses this to identify any applicants that have an entitlement to priority placement consideration.

Add Priority Placement Programs Click to add another row to the Priority Placement Considerations grid.

Employees Being Replaced

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 9.0 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 9.0 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.

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End Date	Enter the date on which the job is scheduled to end. This field is for temporary job openings.
(USF) Not To Exceed Date	If this is a temporary position, enter the date on which it will end.
(USF) Not To Exceed Days	If this is a temporary position, enter the maximum number of days after the Not To Exceed Date by which the job can extend.
(USF) Summer Appointment	Select this check box if this position is a summer appointment. This information is sent as part of the vacancy information for the USA Jobs program. When there are multiple job codes, the primary job code value for summer appointment is used.
Shift	Select the shift for this job opening. This field can be used as a parameter for screening applicants.
Hours	Enter the default number of hours in a normal workweek for this job. The field defaults to the number associated with the job code. This field can be used as a parameter for screening applicants. It is compared to the Desired Hours Per Week field on the Application Details page.
Work Period	Select the time period in which employees must complete the standard hours. These values are created by using the Frequency table.
Travel Percentage	Enter the percent of travel required by this job. This field can be used as a parameter for screening applicants. It is compared to the Travel Percentage field on the Application Details page.
(USF) Supervisor Level	Enter the supervisor level. The default value is the level assigned on the job code.
(USF) FLSA Status (fair labor standards act status)	Displays the FLSA status associated with the job code.
(USF) LEO/Fire Position (law enforcement officer/fire position)	Displays the LEO/Fire position code associated with the job code.
(USF) Sensitivity Code	Select a sensitivity code. The default value is the value assigned to the job code.
(USF) Type of Appointment	Select the type of administrative post.

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

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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 9.0 PeopleBook: Manage Profiles*, “Setting Up the Content Catalog”.

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 9.0 PeopleBook: Manage Profiles*, “Setting Up the Content Catalog”.

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 9.0 PeopleBook: Manage Profiles*, “Setting Up the Content Catalog”.

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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 9.0 PeopleBook: Manage Profiles*, “Setting Up the Content Catalog”.

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 9.0 PeopleBook: Manage Profiles*, “Setting Up the Content Catalog”.

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 9.0 PeopleBook: Manage Profiles*, “Setting Up the Content Catalog”.

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 9.0 PeopleBook: Manage Profiles*, “Setting Up the Content Catalog”.

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.

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See Chapter 2, "Setting Up Recruiting Processes," Setting Up Applicant Screening, page 29.

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.

Transmutation Select this check box 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 this check box 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 this check box 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 this check box 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 this check box 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 this check box 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.

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Veteran Preferred in Tie Break Select this check box to allow veterans preference be used as a tie breaking criteria.

(USF) Noncompetitive

Rank Candidates of Category 1 Select this check box 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 this check box 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 this check box 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 this check box to allow veterans preference be used as a tie breaking criteria.

Applicant Screening

Use this group to define the screening levels you want available for the screening process. The values in this group box default to the values entered in the screening template. You can delete and add screening levels.

See Chapter 2, "Setting Up Recruiting Processes," Setting Up Applicant Screening, page 29.

Job Postings

Postings Click the posting link to display the Posting Information page, where you can edit the posting information.

Primary Posting Title Click to indicate that this is the primary posting title. This is used by the system if you allow multiple jobs on one job opening.

Add Postings Click to Add Job Posting link to display the Posting Information page, where you can add posting information.

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.

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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.

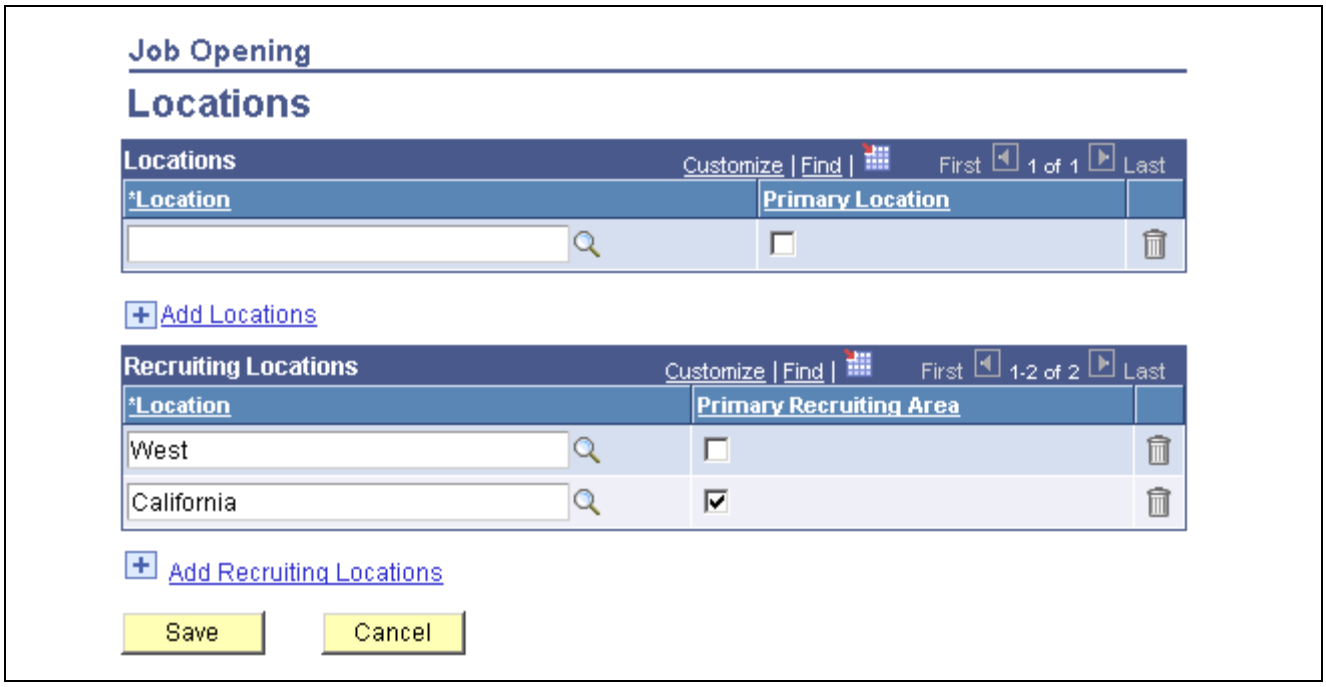
Interested Party

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.

Adding Locations to Job Openings

Access the Job Opening - Locations page.

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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.

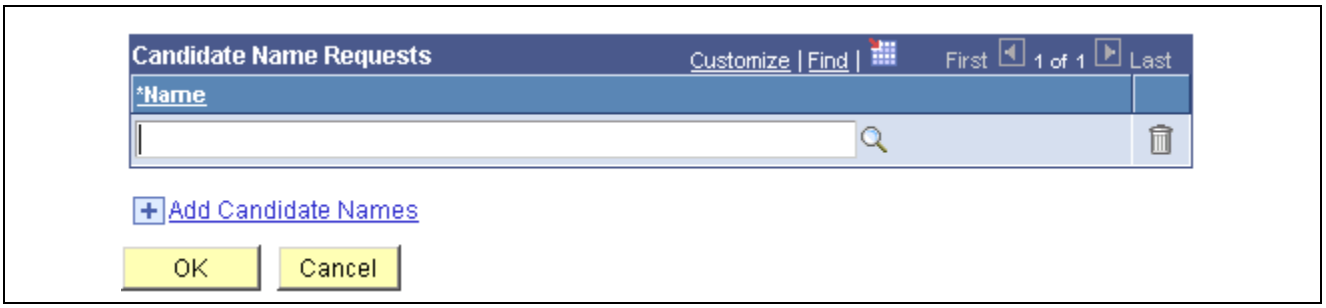
Primary Recruiting Area If there is more the one recruiting location associated with the job opening, indicate which recruiting location is primary.

Add Recruiting Locations Click to add another row to the Recruiting Locations grid.

(USF) Entering Candidate Name Requests

Access the Candidate Name Requests page.

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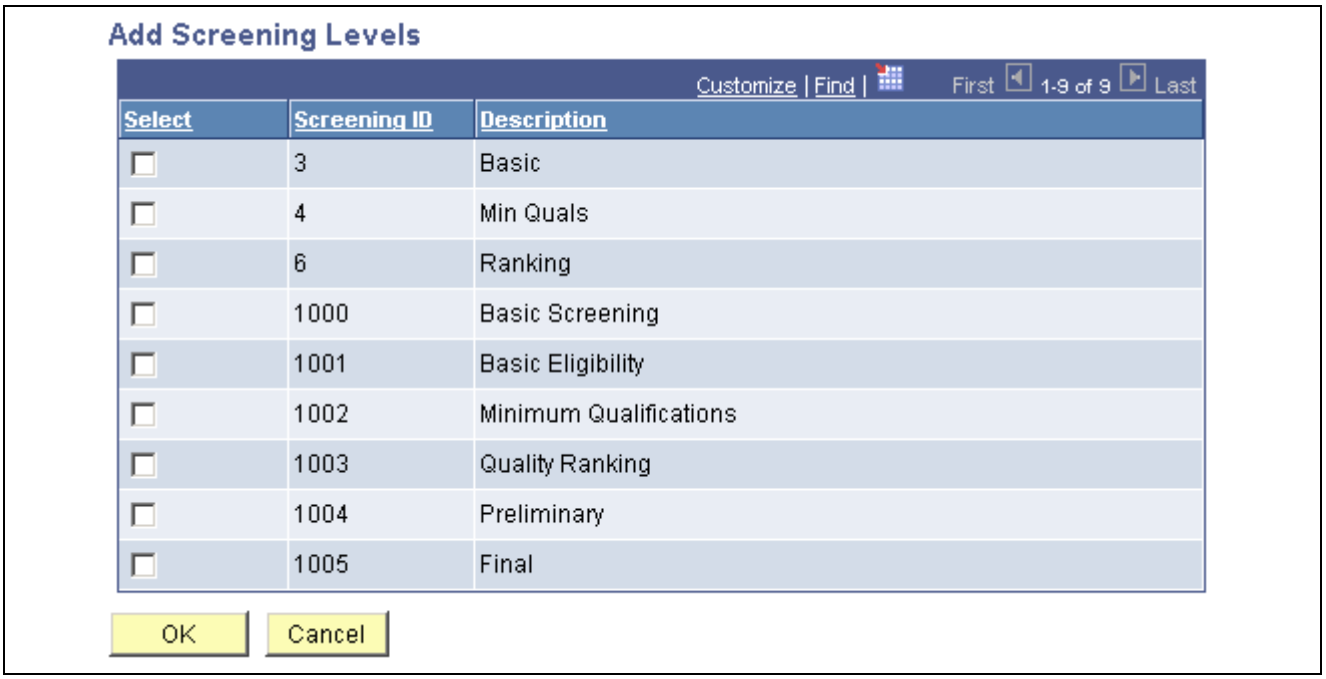


Candidate Name Requests page

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 Levels

Access the Add Screening Levels page.



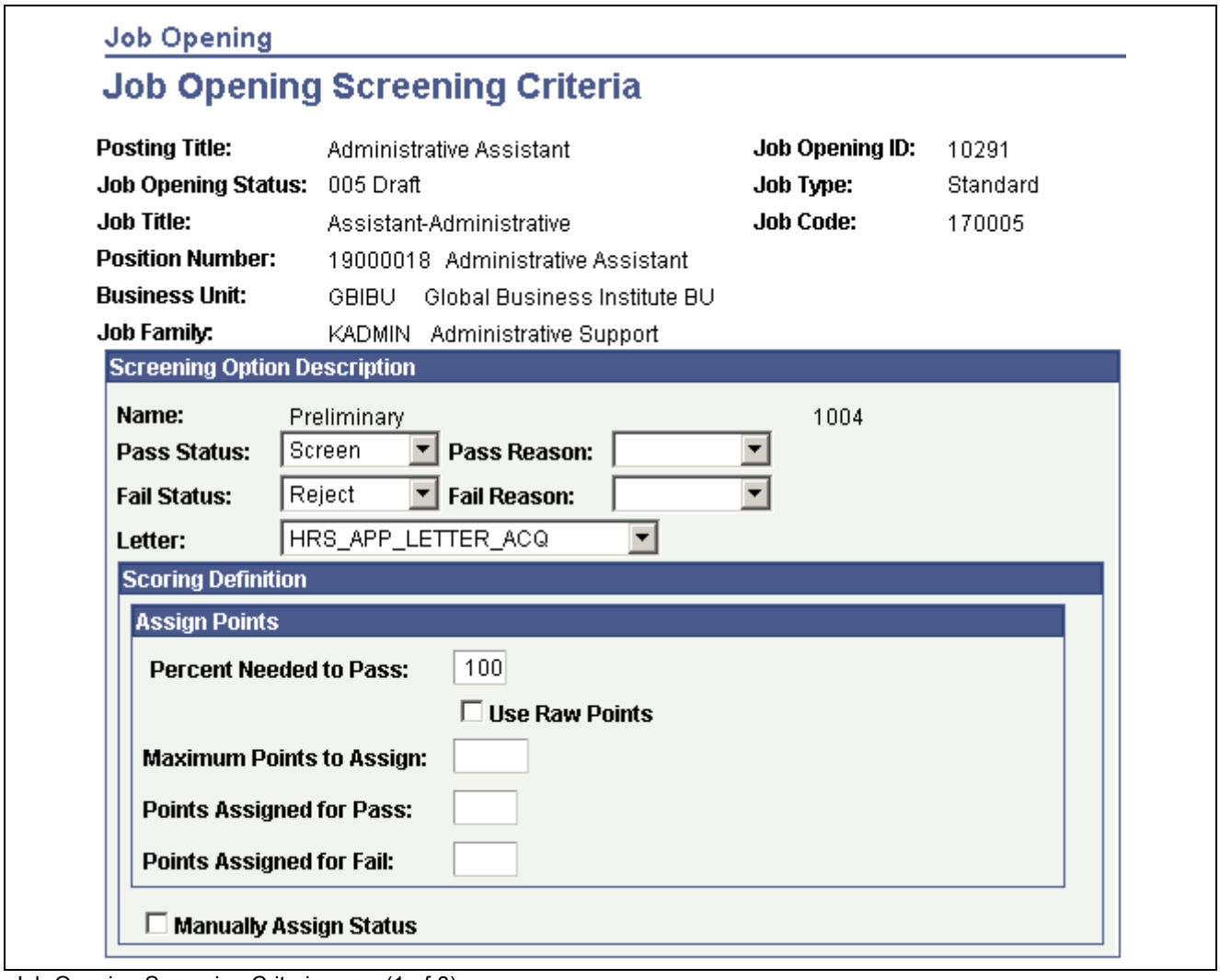
Add Screening Levels page

Select the check box next to the screening level you want to add and click the OK button.

Adding Screening Criteria to Screening Levels

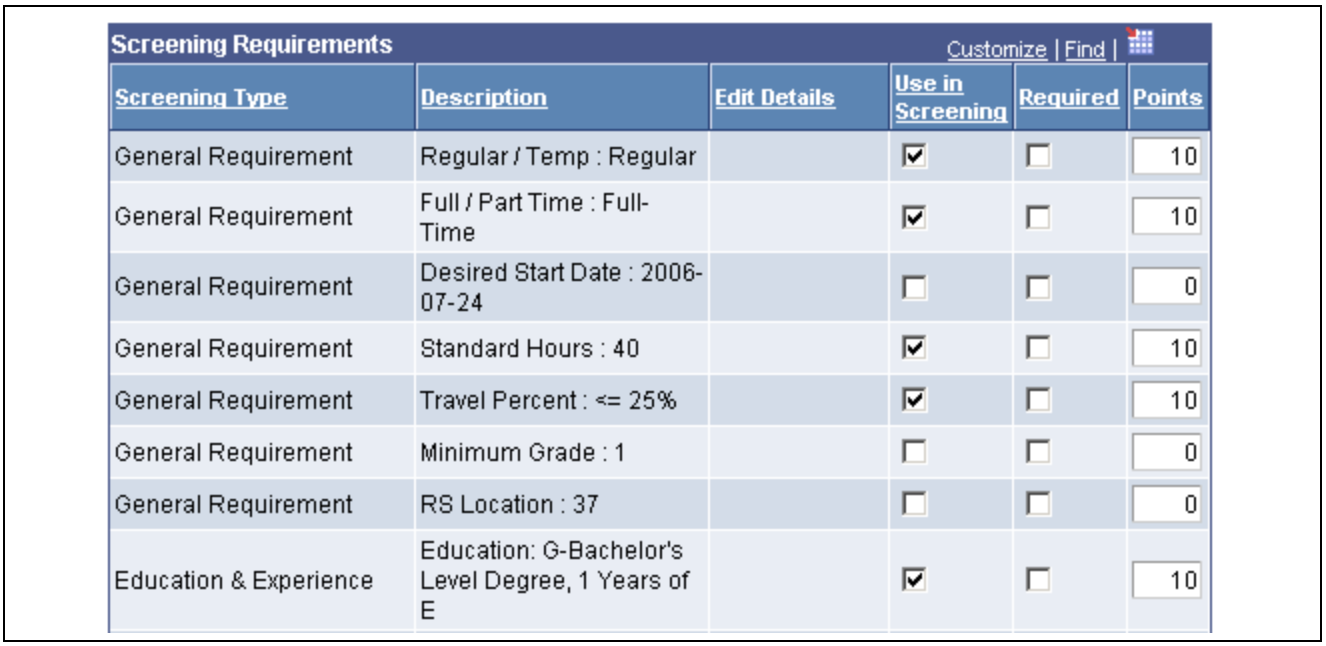
Access the Job Opening Screening Criteria page.

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Job Opening Screening Criteria page (1 of 3)

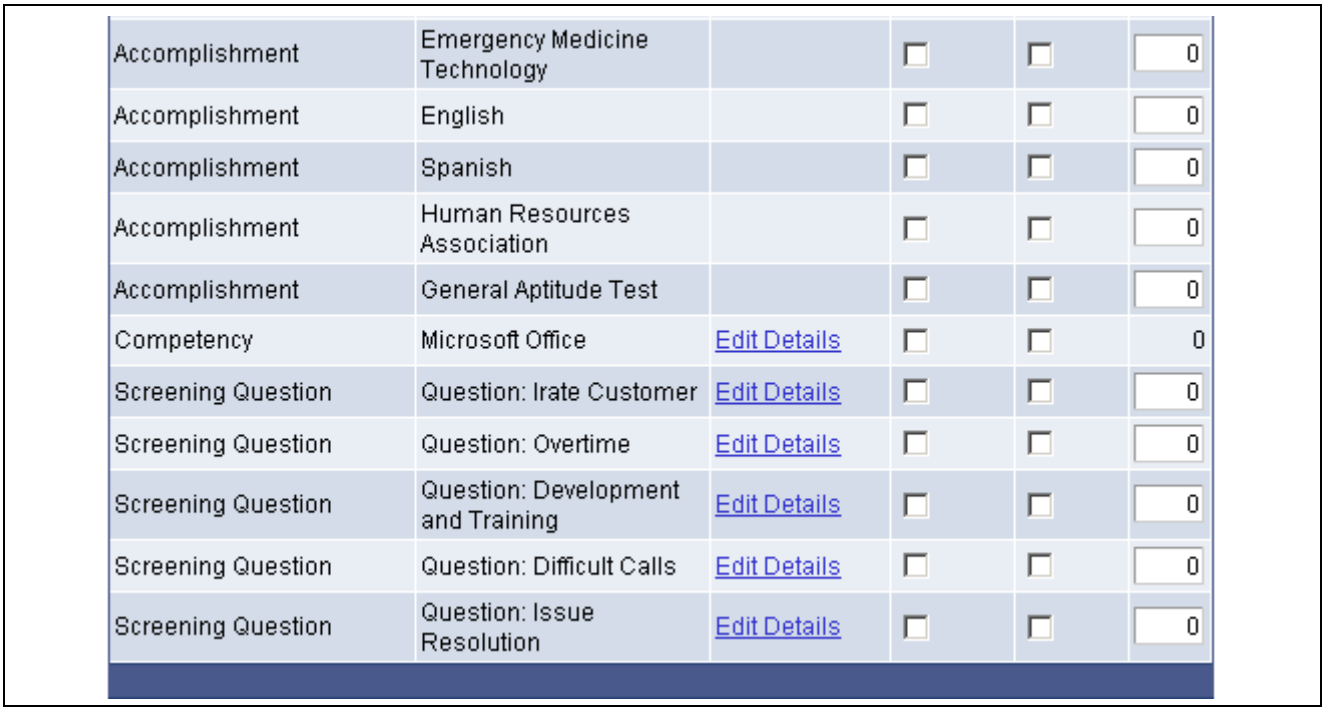
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Screening Requirements — Customize | Find |

Screening Type	Description	Edit Details	Use in Screening	Required	Points
General Requirement	Regular / Temp : Regular		☑	☐	10
General Requirement	Full / Part Time : Full-Time		☑	☐	10
General Requirement	Desired Start Date : 2006-07-24		☐	☐	0
General Requirement	Standard Hours : 40		☑	☐	10
General Requirement	Travel Percent : <= 25%		☑	☐	10
General Requirement	Minimum Grade : 1		☐	☐	0
General Requirement	RS Location : 37		☐	☐	0
Education & Experience	Education: G-Bachelor's Level Degree, 1 Years of E		☑	☐	10

Job Opening Screening Criteria page (2 of 3)



Accomplishment	Emergency Medicine Technology		☐	☐	0
Accomplishment	English		☐	☐	0
Accomplishment	Spanish		☐	☐	0
Accomplishment	Human Resources Association		☐	☐	0
Accomplishment	General Aptitude Test		☐	☐	0
Competency	Microsoft Office	Edit Details	☐	☐	0
Screening Question	Question: Irate Customer	Edit Details	☐	☐	0
Screening Question	Question: Overtime	Edit Details	☐	☐	0
Screening Question	Question: Development and Training	Edit Details	☐	☐	0
Screening Question	Question: Difficult Calls	Edit Details	☐	☐	0
Screening Question	Question: Issue Resolution	Edit Details	☐	☐	0

Job Opening Screening Criteria page (3 of 3)

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.

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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 Select the letter that you want sent to the applicant if they fail the screening level.

This field value defaults to the value entered on the Screening Definition page.

Scoring Definition

Use this group box to define the rules for how screening levels will be scored. The values default to those defined for the screening level.

See Chapter 2, "Setting Up Recruiting Processes," Setting Up Screening Definitions, page 31.

Assign Points

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 defaults to the value entered on the screening level definition..

Use Raw Points Select this check box if you want the accumulated points for an applicant used to determine the screening score. 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.

Manually Assign Status Select if you want to assign a *Pass* or *Fail* status to the applicant after the screening level is run.

Screening Requirements

Screening Type Displays the category to which the screening criteria belongs.

Description Displays the job requirements specified in the job opening details.

Edit Details This column displays if the screening criteria requires a competency rating.

Click to access the Define Competency Points page where you can change the points associated with the competency.

Used in Screening Select this check box is you want this item used by the system during the screening process.

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Required Select this check box if the applicant must have this criteria to pass the screening level. If the system determines that the applicant does not have this criteria, the screening status is automatically set to *Fail*.

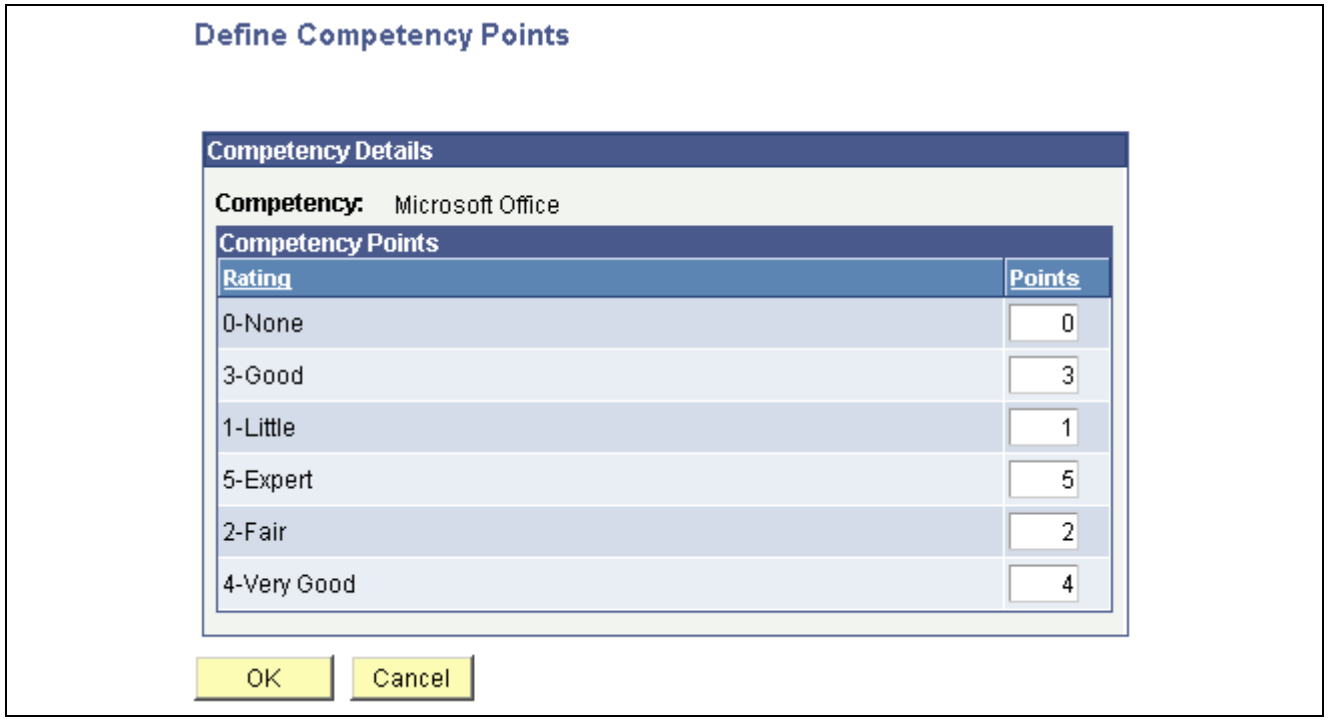
(USF) Augment Select this check box if you want to use this item as extra-credit points for the applicant when they meet this criteria. The points associated with the screening requirment are added to the Augumentation Points category on the Screening Details page.

(USF) Selective Select this check box if you want to use this item as extra-credit points for the applicant when they meet this criteria. The points associated with the screening requirment are added to the appropriate screening type as well as the Selective Factor Points category on the Screening Details page.

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.

Defining Competency Points

Access the Define Competency Points page.



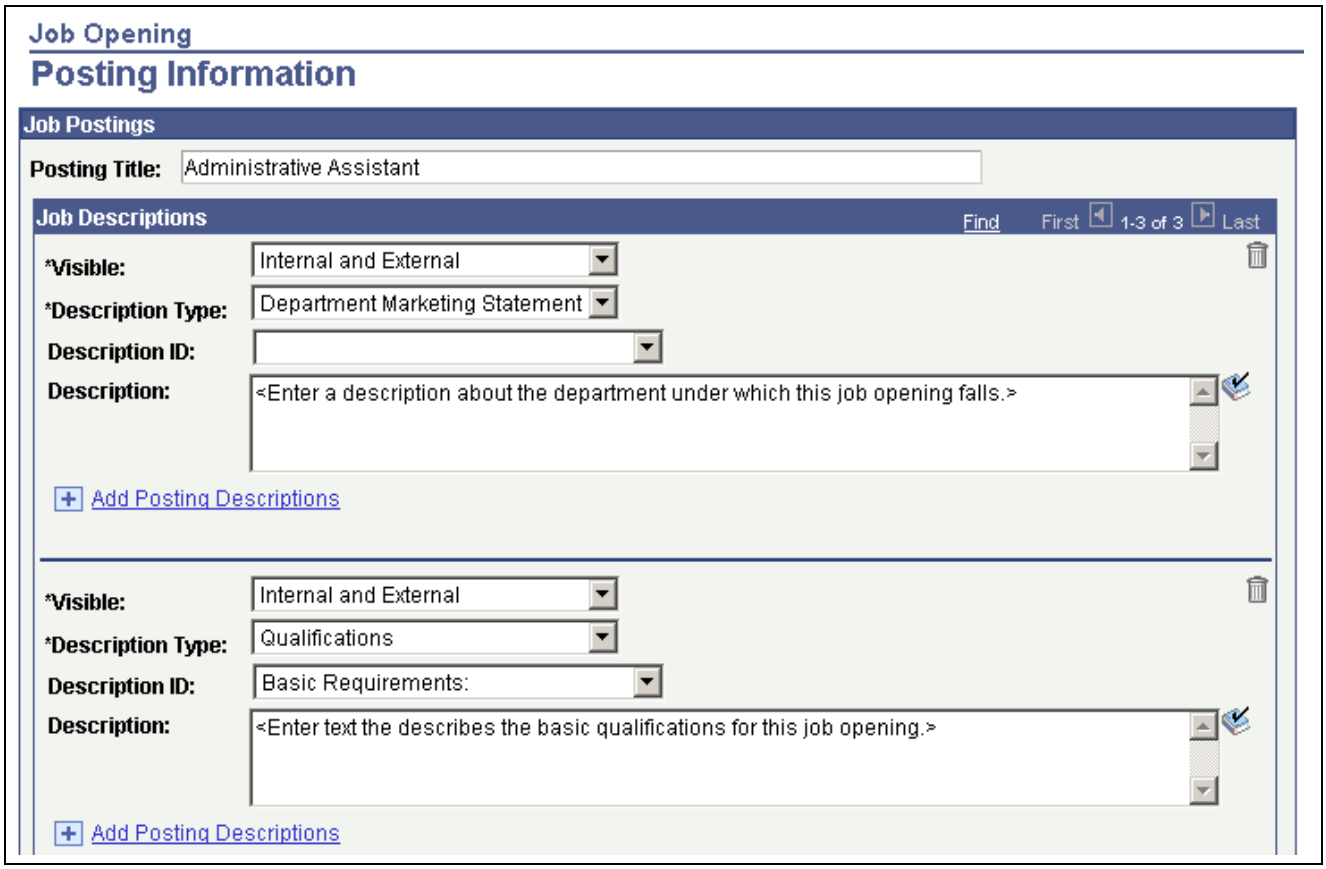
Define Competency Points page

For each rating enter the points that you want assigned to an applicant if they meet that screening criteria.

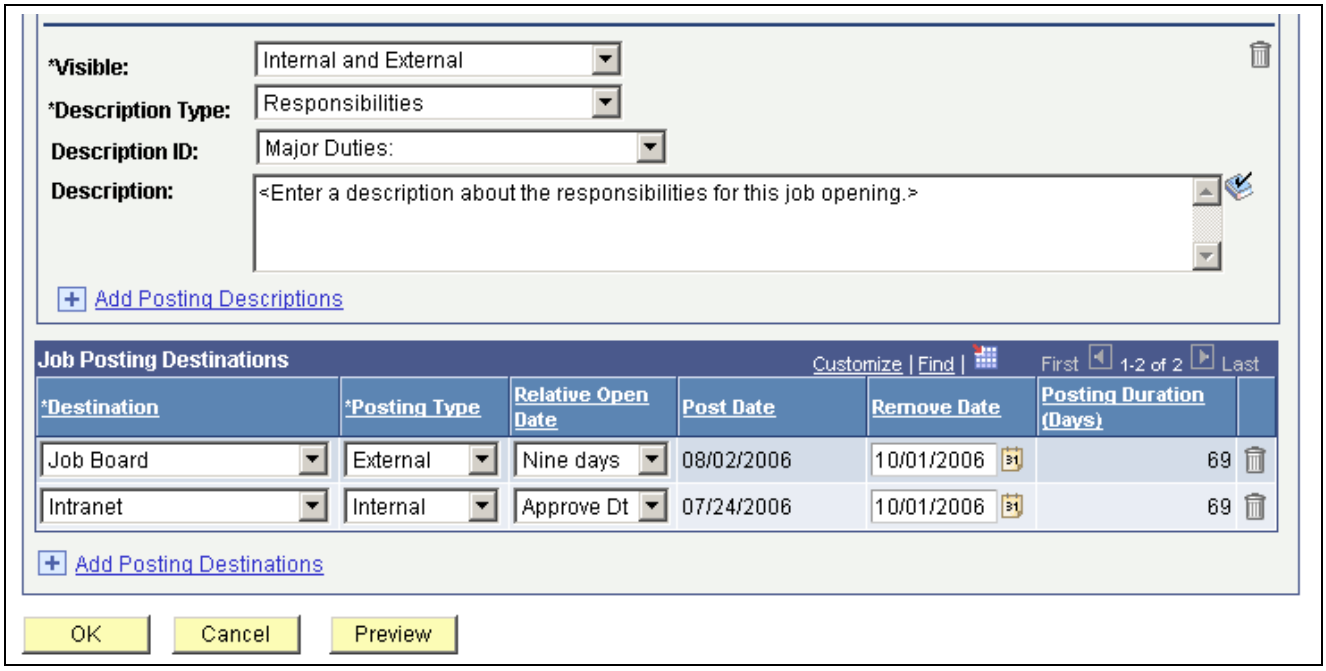
Adding Job Posting Details

Access the Posting Information page.

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Posting Information page (1 of 2)



Posting Information page (2 of 2)

Job Postings

Posting Title Displays the title entered on the Job Opening page, but can be modified.

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Job Descriptions

Visible Specify whether this posting description is visible to *Internal, External,* or *Internal and External* applicants.

Description Type Select a description type. The choices available to you are defined on the job posting template that is linked to the recruitment template assigned to the job opening.

Description ID Select a description from the Posting Description Library page. The system automatically populates the Description field with the text from the library posting.

Description Enter a description for this description type.

Add Posting Descriptions Click to add another row to the Job Descriptions.

See Chapter 2, "Setting Up Recruiting Processes," Setting Up Job Postings, page 18.

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 103.

Posting Type Select the type of posting. Options are:

- *Contingent*
- *External*
- *Internal*
- *Office*
- *Recruitment*

Relative Open Date Select the date on which you want the job posting posted to this destination. If you select one of the available options, the Post Date field becomes unavailable and defaults to date based on the calculation: (date on which job opening equals Open + selected option).

For example, if the date the job opening reaches the status of *Open* is September 1, 2006 and you select *Ten Days*. The Post Date field will equal September 11, 2006.

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.

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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.

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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 409.

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

Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications

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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, find the job opening you want to clone and click the Clone Job Opening icon or select Clone Job Opening. The system creates a new job opening and set the status to *Draft*. Modify the job opening to fit your needs and submit. If approvals is active, then the system sets the status of the job opening to *Pending*. If approvals is not active, the system sets the status to *Open*here. 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.
Approval process, if exists.	Copied
Primary Recruiter/Hiring Manager Teams.	Active teams copied
Additional recruiters, hiring managers, and teams.	Active teams copied.

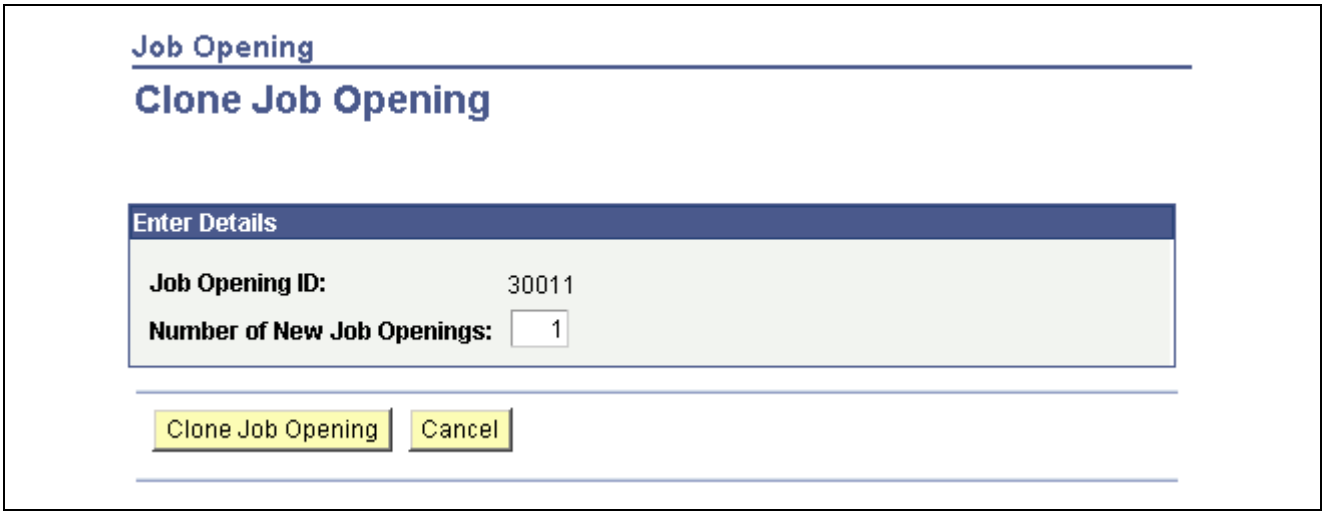
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Pages Used to Clone Job Openings

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.
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 Clone Job Opening page.



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.

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Understanding Job Opening Approvals

Recruiting Solutions uses the JobOpening process ID, created in the approval component (PTAF_TXN), to approve job openings. To use the approval process for job openings, you must select the Standard Requisition, Continuous Job Opening, or both 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.

   Note. If the supervisor of the primary hiring manager is inactive, the system checks the level up to find the supervisor of the inactive employee.

   See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, “Setting Up and Working with Self-Service Transactions,” Setting Up Access to Direct Reports Data.

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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.

While the job opening is in the approval process, information on the job opening can be changed. However, changing the data in specific fields before the job opening has reached final approval causes the system to start the approval process over. A notification is sent to the first approver and the approval process begins again.

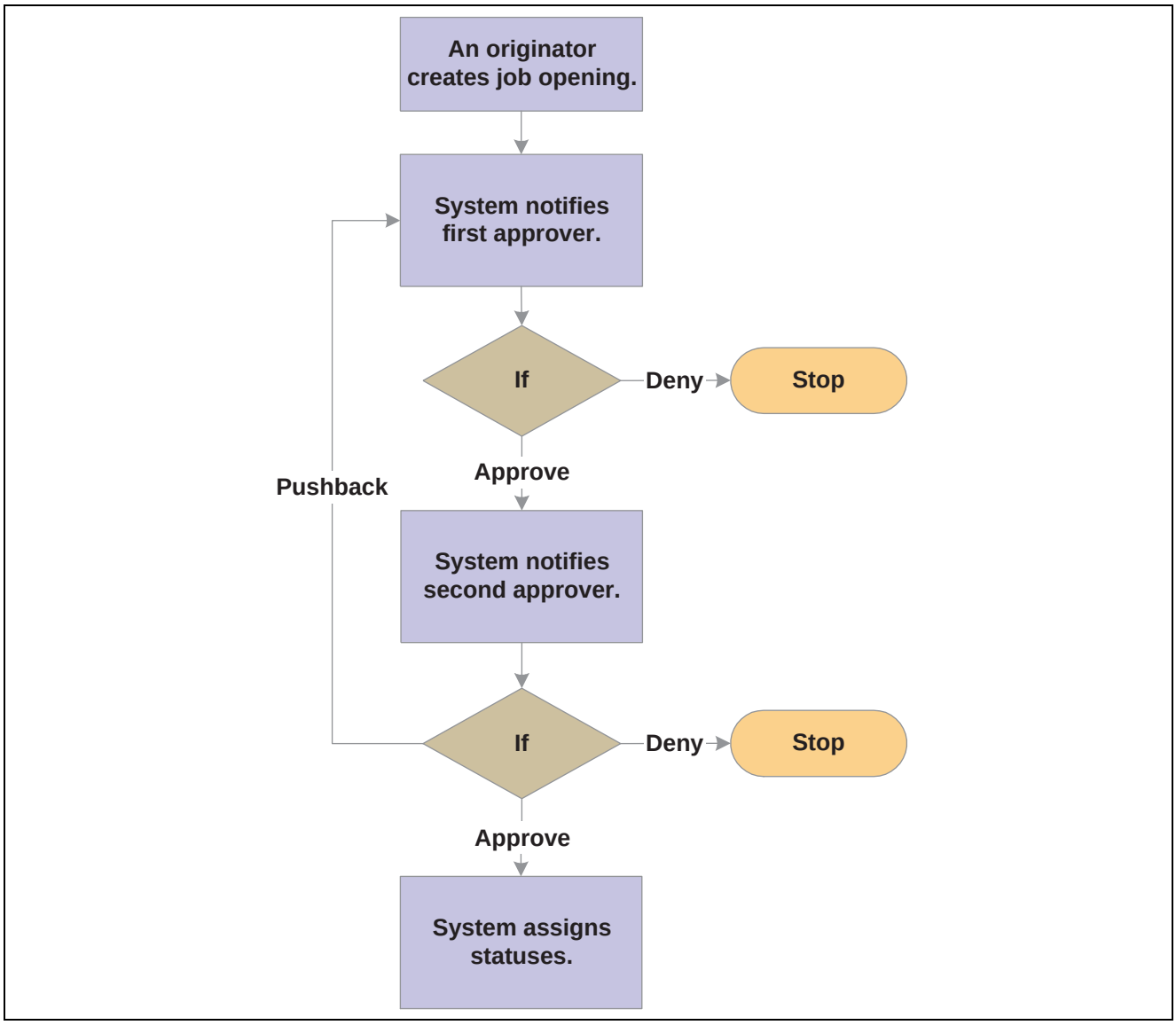
Note. Changes to an approved and posted job opening do not have to be approved again.

The fields that can cause a trigger to occur are:

- Target Openings.
- Job Code.
- Position Number.
- Salary Administration Plan.
- From Salary Grade.
- To Salary Grade.
- Full-time/Part-time.
- Regular/Temporary.
- Standard Hours.
- (USF) Recruitment Type.
- (USF) Area of Consideration.
- (USF) Salary Range From.
- (USF) Salary Range To.
- (USF) Pay Frequency.
- (USF) Citizenship Status.

This diagram shows the delivered three-step job opening approval process:

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Delivered two-step job opening approval process

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Working with Self-Service Transactions," Setting Up Access to Direct Reports Data

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Working with Approvals"

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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 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 Approvals page. • Click the Insert Approver icon on the Disposition Details page.	Add approvers or reviewers to the approval process.

Viewing Pending Approvals

Access the Pending Approvals page.



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.

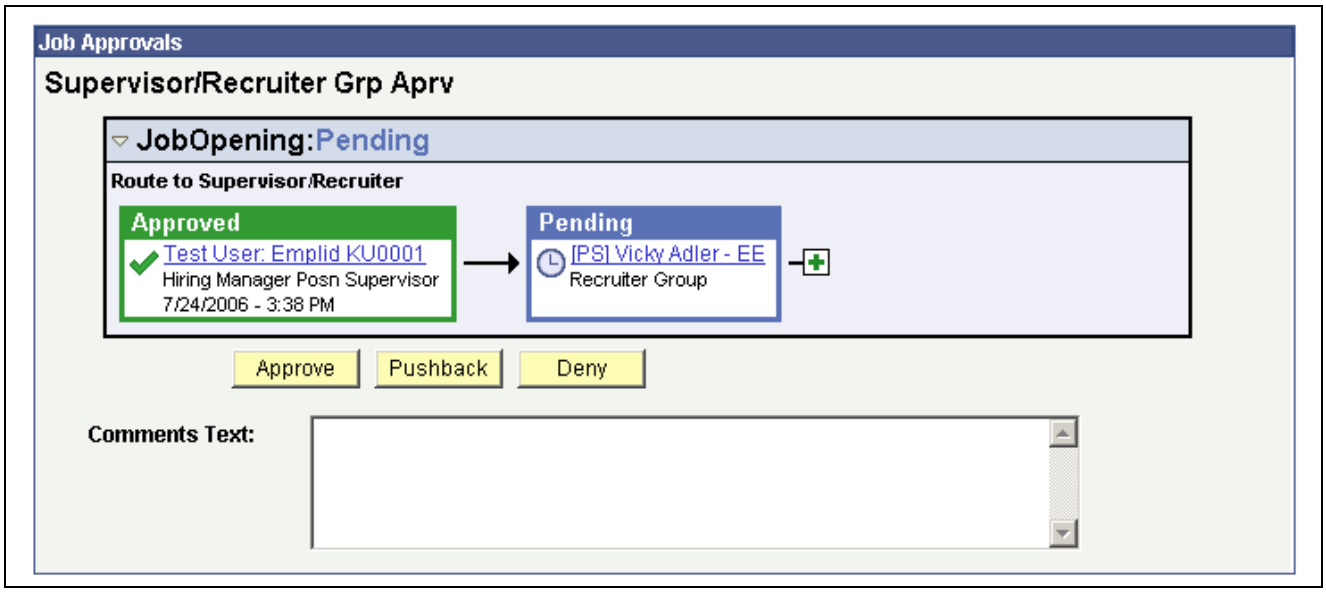
Subject Click a job approval link to access the Job Opening page, where you can view details for and approve the job opening.

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 Approvals page.

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Job Opening - Approvals page

JobOpening: <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 This is available only to the second approver.

Click to send a notification to the previous approver telling them the job opening needs to be changed.

Deny Click to reject the job opening and set the job opening status to *Closed.*

Adding Another Approver or Reviewer

Access the Insert additional approver or reviewer page.



Insert additional approver or reviewer page

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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.

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CHAPTER 7

Entering Applicants

This chapter provides an overview of how applicant data is entered and describes how to:

- Enter contact information.
- Enter application information.
- Enter references.
- Enter applicant eligibility and identity information.

Understanding How Applicant Data is Entered

There are four methods by which applicant records are created in the system:

- Recruiters, recruiting administrators, and managers use the Add New Applicant (HRS_ADD_APPLICANT) component to enter in the data.
- Applicants use Candidate Gateway to submit an application.
- Applicants send their resumes to an email address and a process is run that reads the resume text, converts the text to data, and creates the applicant record.
- Resumes are processed through the Open Integration Framework.

Note. This chapter discusses the Add New Applicant component.

The Add New Applicant component has four areas to complete:

- Contact Details

  Contact details consist of name, address, email addresses, and phone numbers. When you enter the contact information, use the EmplID field to look up the applicant's name and see if he or she is in the PeopleSoft Enteprise Human Resources database. Applicants fall into three categories:

  - External – He or she does not work, nor has he or she ever worked for the company.
  - Employee – He or she is working or has worked for the company.
  - Non-employee – He or she is a person-of-interest in the system.

  If you select an employee ID, the system automatically determines the category to apply to the applicant. It also populates any application and eligibility information it can find.

  Before you can enter the application information, the system requires that you enter the applicant's first and last name, and save this data.

- Applications

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This link is available only after you have saved the contact information. Applications can be created with or without a job opening. The application contains information such as:

- Resumes
- Cover letters
- Preferences
- Personal information
- Referral source
- Work experience
- Education level
- Primary Education
- Secondary Education
- Training
- Licenses and certificates
- Languages
- Memberships
- Honors and awards
- Competencies
- Test results
- (USF) Priority placement
- (USF) Federal preferences

You can create an unlimited number of applications for an applicant. Each application can be linked to a different job open. When an application is first created, the system assigns an application date based on the system date. If another application is submitted, the system creates a new applicant record with a new application date. This provides an audit trail of changes to applicant application information.

- Verification

  You can enter references for the applicant or send a workflow request to the applicant asking him or her to submit references.

- Eligibility and Identity

  Enter eligibility and identify information as required by your organization or to comply with local or country regulatory requirements. Enter information such as:

  - National IDs
  - Citizenship
  - Visa and work permits
  - Bank accounts
  - Disabilities
  - Accommodation requests and options

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Entering Contact Information

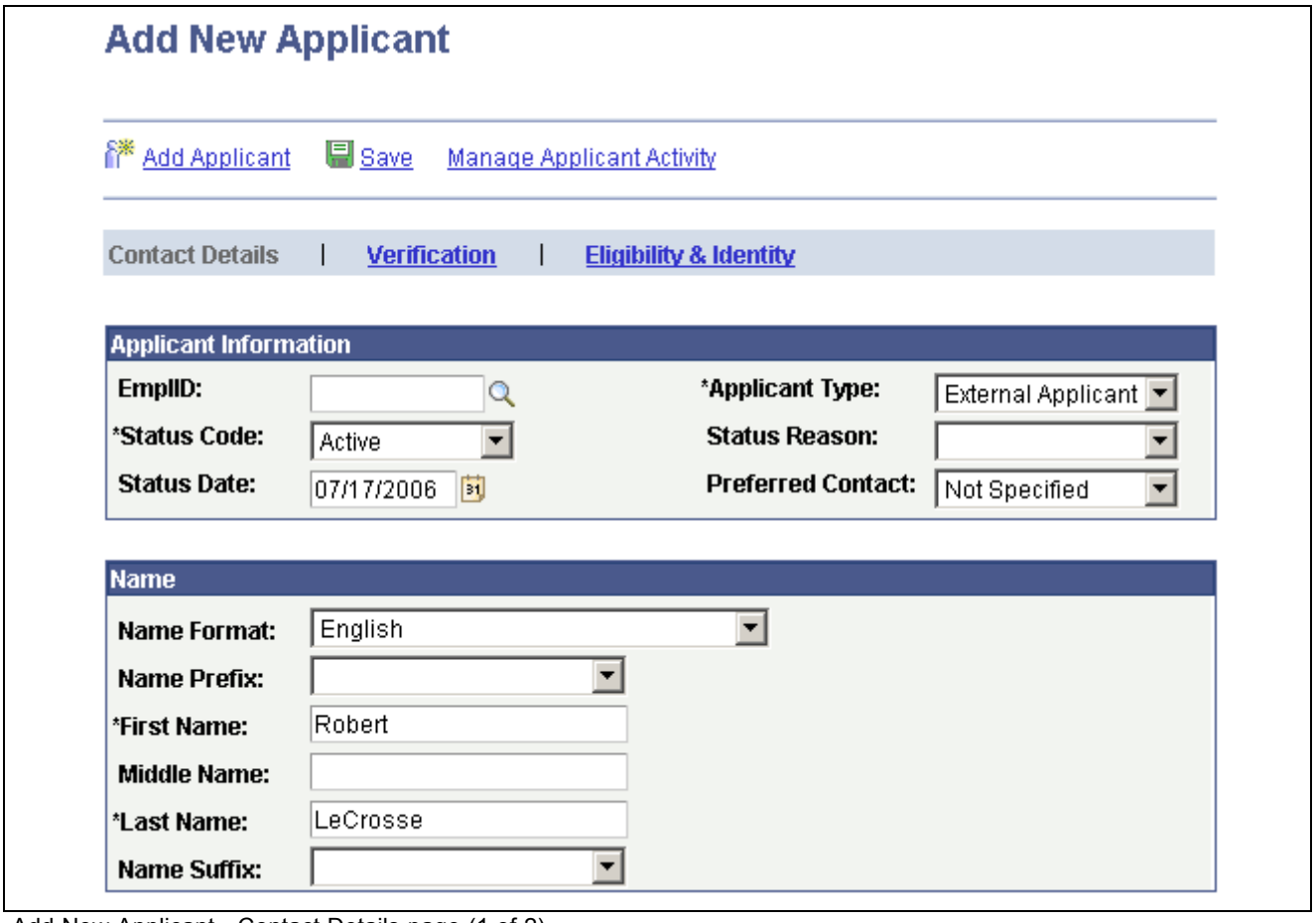
This section discusses how to enter contact information.

Page Used to Enter Contact Information

Page Name	Object Name	Navigation	Usage
Add New Applicant - Contact Details	HRS_ADD_APPLICANT	Recruiting, Add New Applicant, Add New Applicant	Enter contact information details.

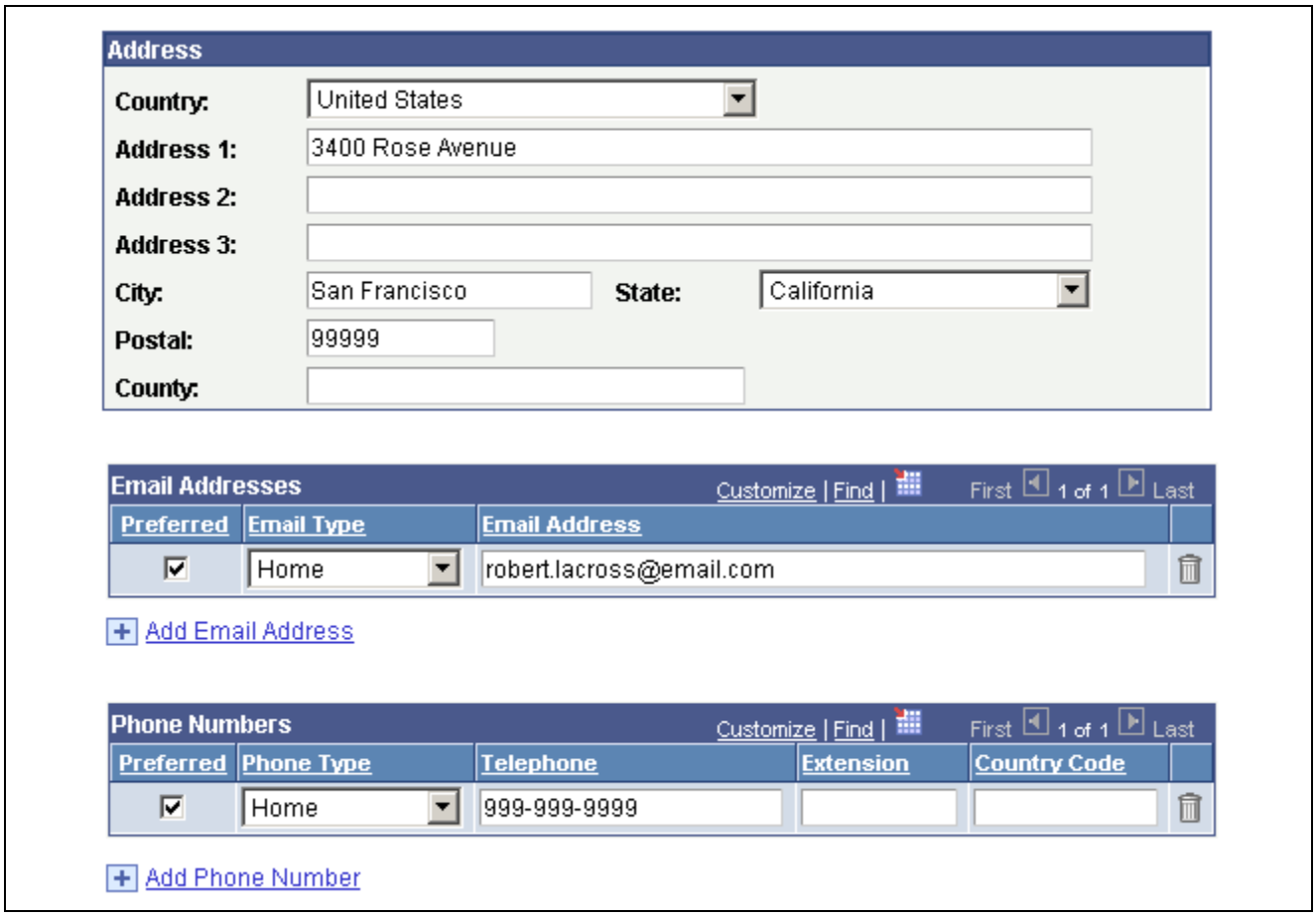
Entering Contact Information Details

Access the Add New Applicant - Contact Details page.



Add New Applicant - Contact Details page (1 of 2)

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Add New Applicant - Contact Details page (2 of 2)

Applicant Information

EmplID employee identification number

If this is a current or former employee, or a person of interest, select the employee ID. For internal applicants, the system copies information from the PeopleSoft Enterprise Human Resources tables and automatically assigns the applicant type.

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.

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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.

The date defaults to the system date and is used only for informational purposes. You can use this date for equal employment opportunity (EEO) reporting and other auditing functions.

Preferred Contact Select the preferred method of contact for the applicant. Values are: *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 discusses how to enter application information.

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Pages Used to Enter Application Details

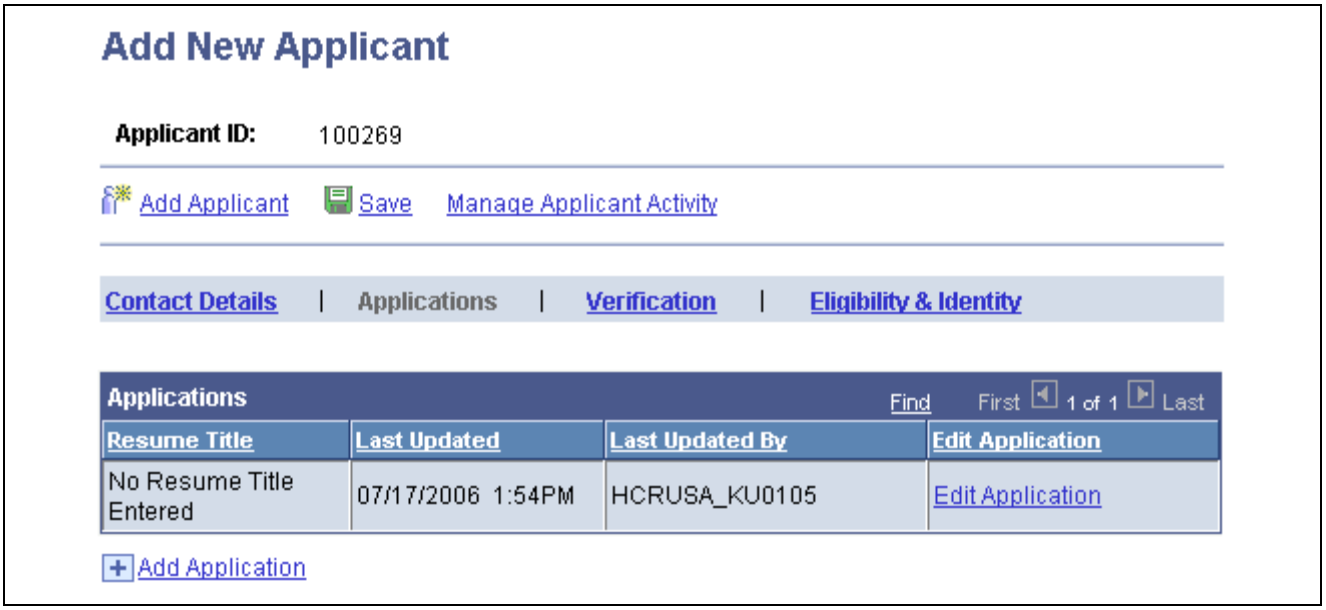
Page Name	Object Name	Navigation	Usage
Add New Applicant - Applications	HRS_ADD_APPLICANT	Recruiting, Add New Applicant, Add New Applicant - Contact Details Click the Applications link on the Add New Applicant - Contact Details page.	Add applicant information.
Application Details	HRS_APP_PROFILE	• Click the Edit Application link on the Add New Applicant - Applications page. • Click the Add Application link on the Add New Applicant - Applications page.	Enter application details.
Add Work Experience, Edit Work Experience	HRS_APP_WRK_SEC	• Click the Add Work Experience link on the Application Details page. • Click the Edit work Experience link on the Application Details page.	Enter work experience information.
Add Primary Education, Edit Primary Education	HRS_APP_PRI_ED_SEC	• Click the Add Primary Education link on the Application Details page. • Click the Edit Primary Education link on the Application Details page.	Enter primary education information.
Add Secondary Education, Edit Secondary Education	HRS_APP_DEG_SEC	• Click the Add Secondary Education link on the Application Details page. • Click the Edit Secondary Education link on the Application Details page.	Enter secondary education information.
Add Licenses and Certificates, Edit Licenses and Certificates	HRS_APP_LIC_SEC	• Click the Add Licenses and Certificates link on the Application Details page. • Click the Edit Licenses and Certificates link on the Application Details page.	Enter license and certificate information.
Add Languages, Edit Languages	HRS_APP_LANG_SEC	• Click the Add Languages link on the Application Details page. • Click the Edit Languages link on the Application Details page.	Enter language information.

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Page Name	Object Name	Navigation	Usage
Add Memberships, Edit Memberships	HRS_APP_MBR_SEC	• Click the Add Memberships link on the Application Details page. • Click the Edit Memberships link on the Application Details page.	Enter membership information.
Add Honors and Award, Edit Honors and Awards	HRS_APP_HON_SEC	• Click the Add Honors and Awards link on the Application Details page. • Click the Edit Honors and Awards link on the Application Details page.	Add or edit honors and awards information.
Add New Evaluation, View Evaluation Detail	HRS_APP_EVAL	• Click the Add Competencies link on the Application Details page. • Click the Edit Competencies link on the Application Details page.	Add or edit competency information.
Add Priority Placement	HRS_CE_ADM_PP	• Click the Add Priority Placement link on the Application Details page. • Click the Edit Priority Placement link on the Application Details page.	Add or edit priority placement information.

Adding Application Information

Access the Add New Applicant - Applications page.



Add New Applicant - Applications page

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Applicant ID This identification number is automatically assigned by the system after you click the Save button on the Add New Applicant page: Contact Details tab.

Add Applicant Click this link to access the Add New Applicant - Contact Details page.

Manage Applicant Activity Click this link to display the Manage Applicant page: Applicant Activity tab.

Applications

This group box displays the applications on file for this applicant.

Edit Application Click this link to access the Application Details page.

Use this link the first time you are adding an application for this applicant. If you click the Add Application link, the system creates a new row in the Applications grid and this first row will remain blank.

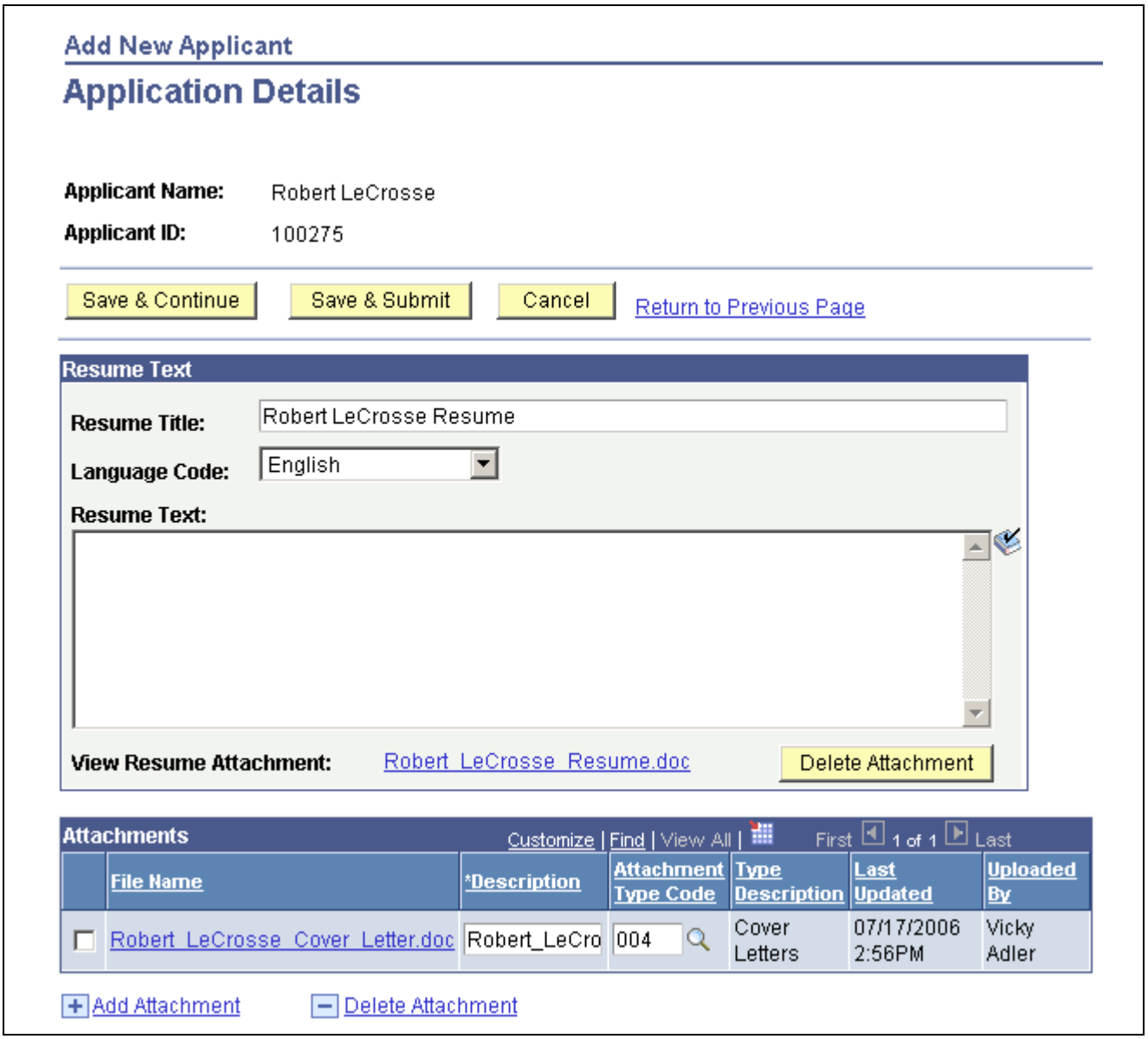
Add Application Click this link to access the Application Details page, where you can enter application details for a new application.

For this link to work, you must enter a first and last name for the applicant on the Add New Applicant - 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 Application Details

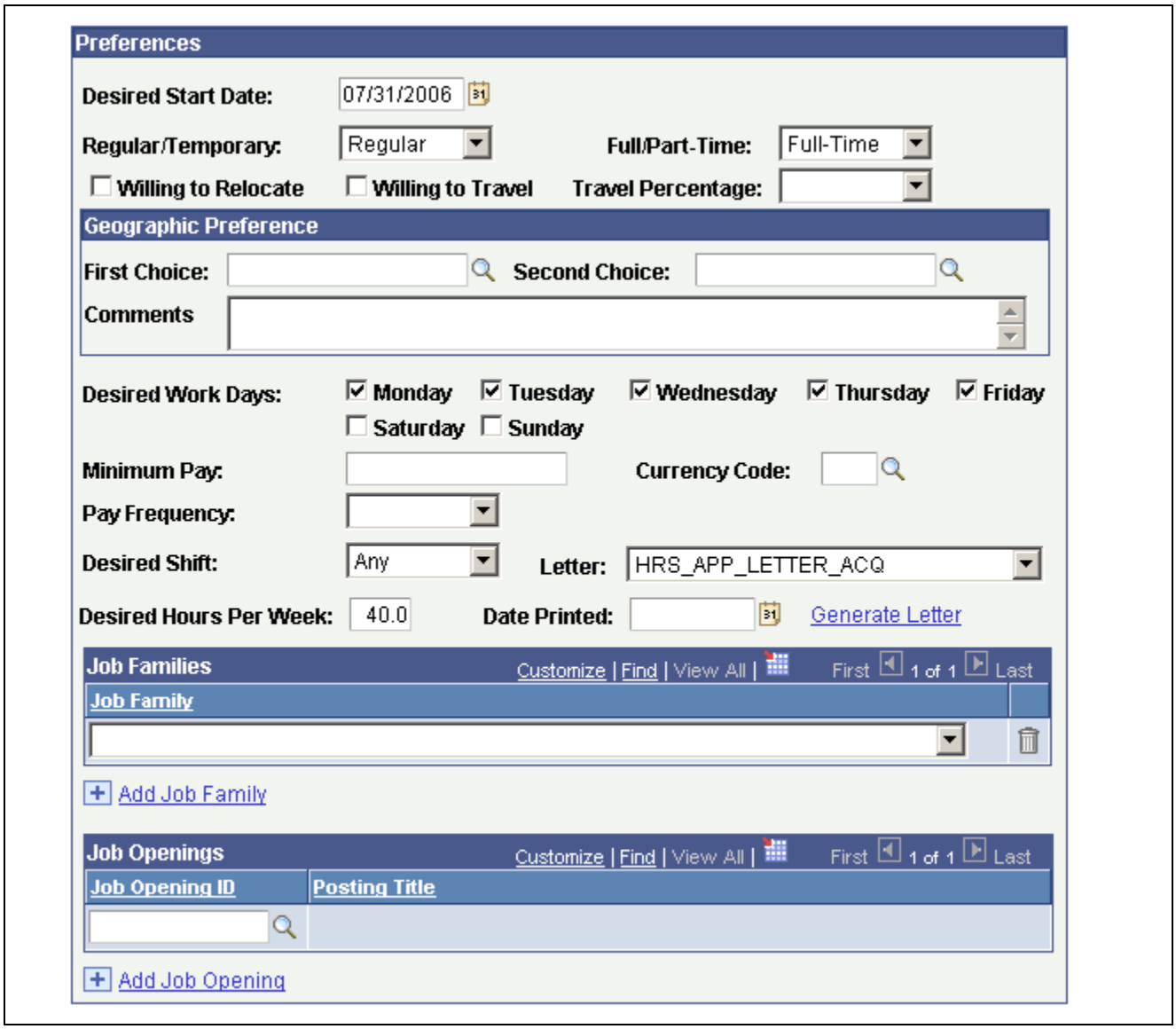
Access the Application Details page.

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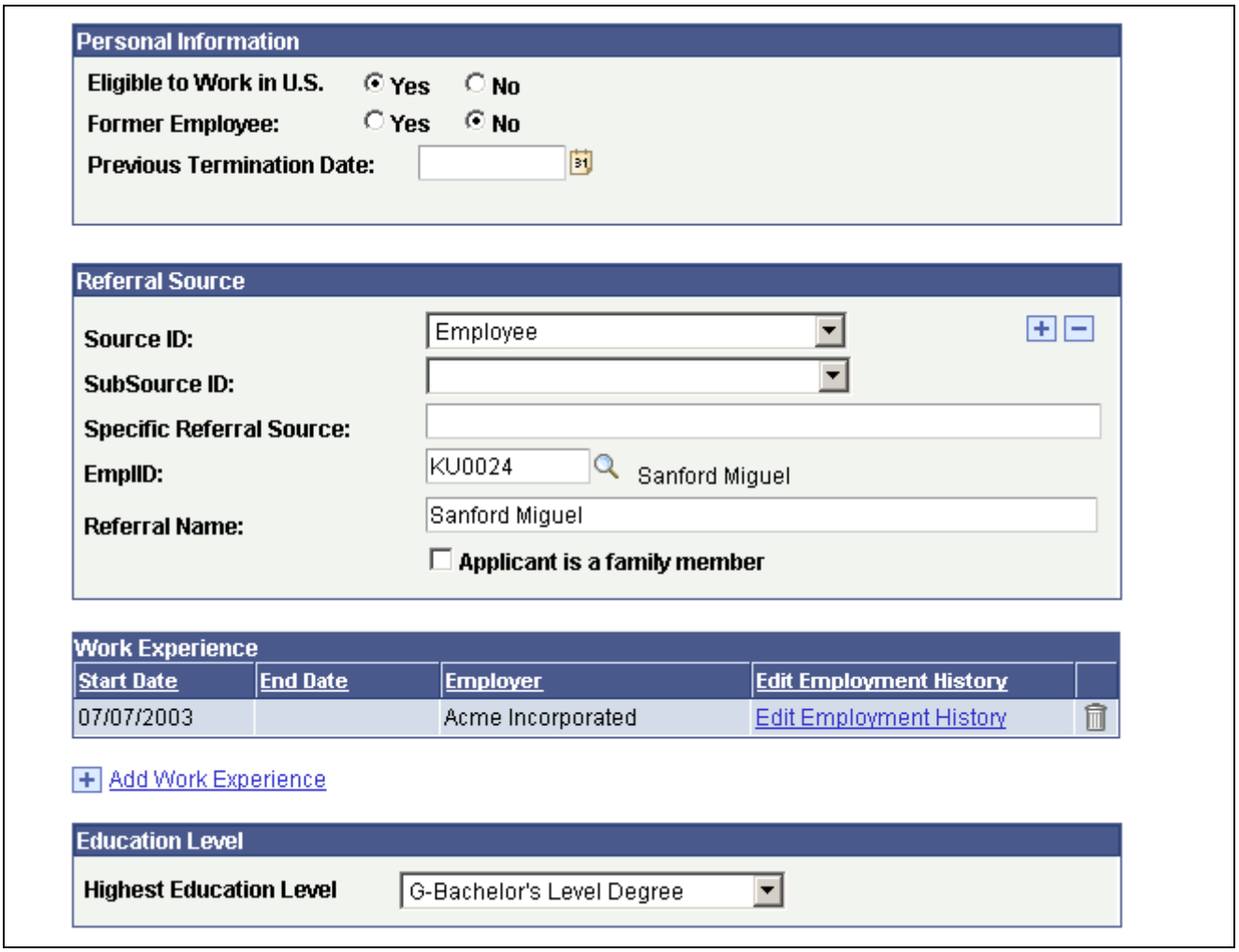
Applicant Details page (1 of 6)

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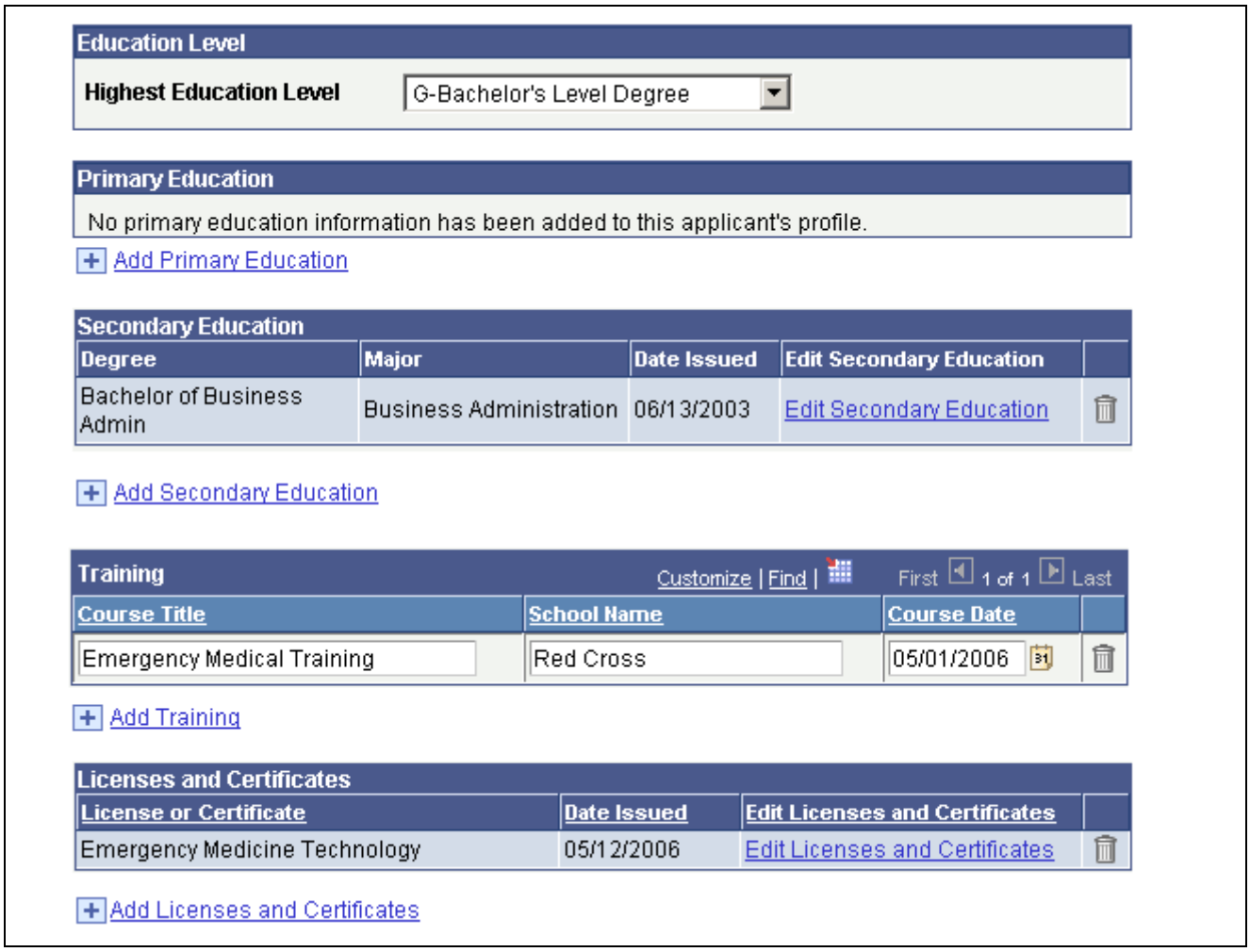
Application Details page (2 of 6)

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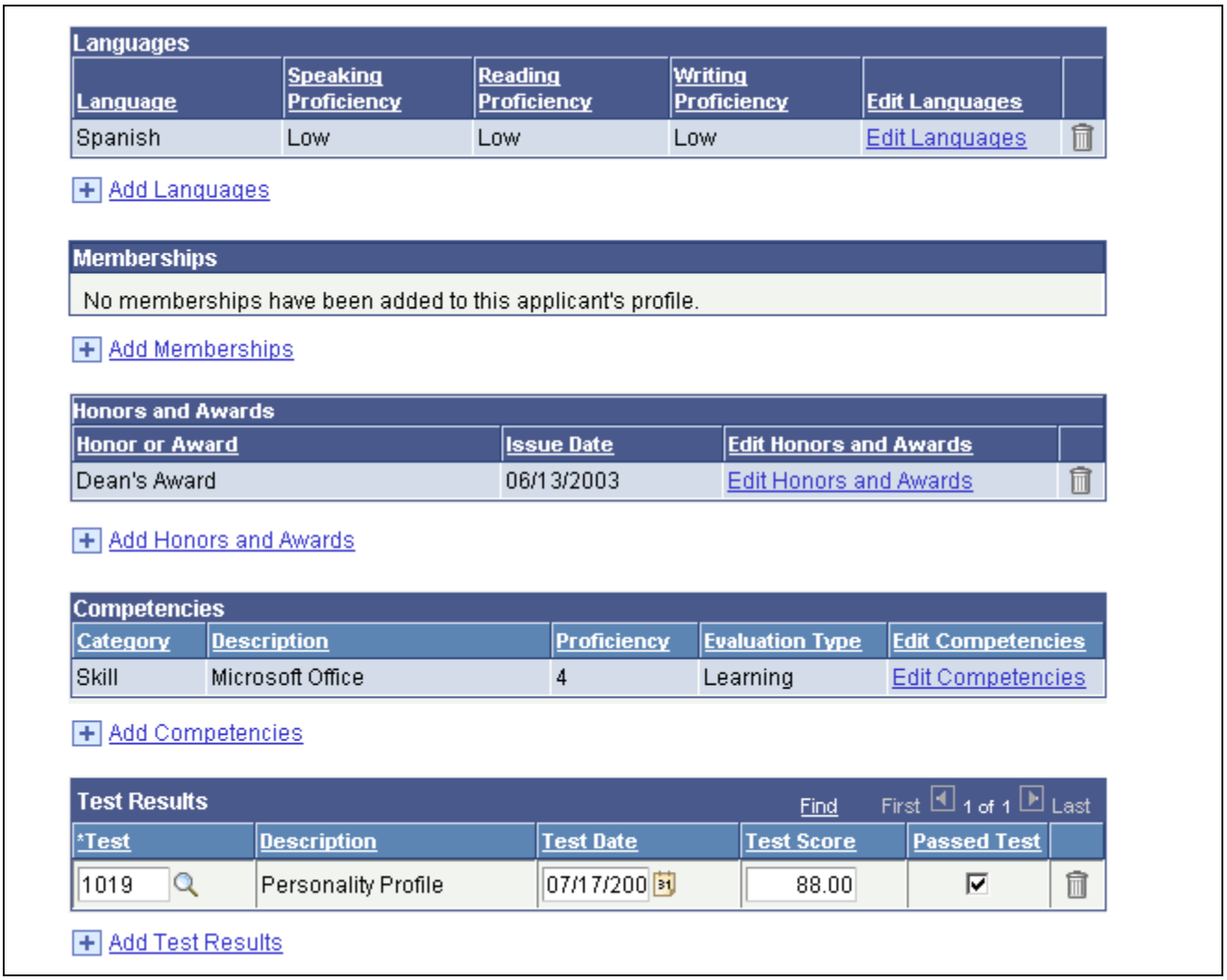
Application Details page (3 of 6)

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Application Details page (4 of 6)

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Languages

Language	Speaking Proficiency	Reading Proficiency	Writing Proficiency	Edit Languages	
Spanish	Low	Low	Low	Edit Languages	

Add Languages

Memberships

No memberships have been added to this applicant's profile.

Add Memberships

Honors and Awards

Honor or Award	Issue Date	Edit Honors and Awards	
Dean's Award	06/13/2003	Edit Honors and Awards	

Add Honors and Awards

Competencies

Category	Description	Proficiency	Evaluation Type	Edit Competencies
Skill	Microsoft Office	4	Learning	Edit Competencies

Add Competencies

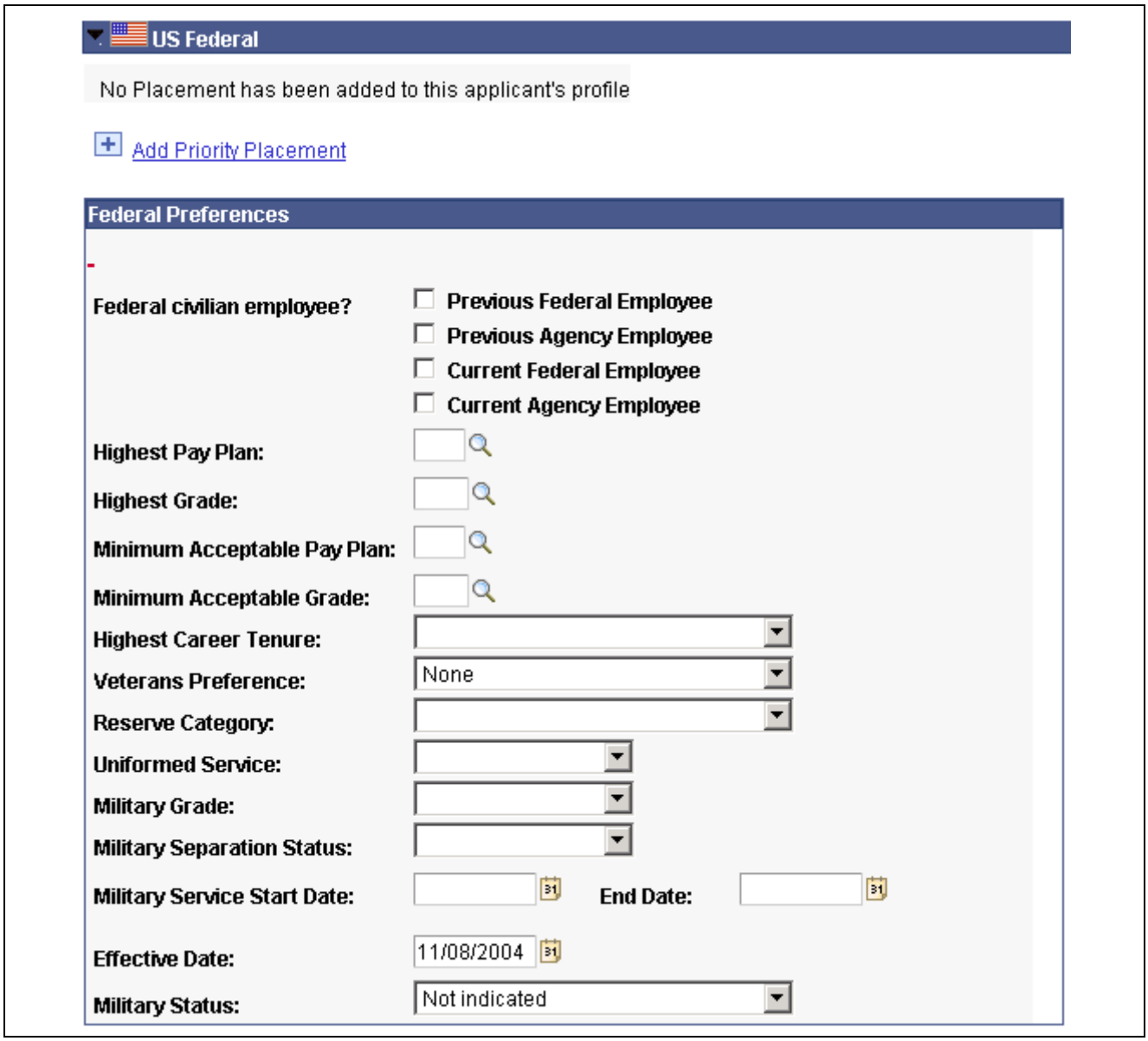
Test Results Find First 1 of 1 Last

*Test	Description	Test Date	Test Score	Passed Test	
1019	Personality Profile	07/17/200	88.00	☑	

Add Test Results

Application Details page (5 of 6)

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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 or copy the text of the resume into the Resume Text field.

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.

To paste the resume into the Resume Text field, the resume must be in text-only format.

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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, however, you can change it.

Attachment Type Code and **Type Description** Select an attachment type.

Attachment types are defined on the Attachment Type Setup page. When you select an attachment type the system populates the Type Description column with the short description that you enter on the Attachment Type Setup page. The system uses the Attachment Type Code field to determine whether the maximum number of attachments of this type has been reached for the applicant.

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 browse for and upload an attachment.

Delete Attachment Click to delete the selected attachments.

Preferences

Desired Start Date Enter the date that the applicant would like to start working.

This field can be used to screen applicants. It is compared to the Start Date field on the Job Opening page.

Regular/Temporary 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.

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	This field can be used to screen applicants. It is compared to the Regular/Temporary field on the Job Opening page.
Full/Part-Time	Select either *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. This field can be used to screen applicants. It is compared to the Full/Part-Time field on the Job Opening page.
Willing to Relocate	Select this check box if the applicant is willing to move to a new location.
Willing to Travel	Select this check box 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.
Travel Percentage	Select the value that best represents the amount of travel the applicant is willing to complete. This field can be used to screen applicants. It is compared to the Travel Percentage field on the Job Opening page.
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. Rrecruiting locations are defined on the Recruiting Location page. This field can be used to screen applicants. It is compared to the RS Location field on the Job Opening page. See Chapter 2, "Setting Up Recruiting Processes," Defining Recruiting Locations, page 16.
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.
Desired Work Days	Select the check boxes next to 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. Minimum pay can be used to screen applicants. It is compared to the Minimum Salary field on the Job Opening page.
Desired Shift	If the applicant wants shift work, select the appropriate shift from the available options. This field can be used to screen applicants. It is compared to the Shift field on the Job Opening page.
Desired Hours Per Week	Enter the number of hours that the applicant is willing to work per week and select the days that the applicant wants to work.

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This field can be used to screen applicants. It is compared to the Standard Hours/Week field on the Job Opening page.

Letter Select a letter code if you want to generate a form letter to send to the applicant. Talent Acquisition Manager delivers the following letter templates:

- *HRS_APP_LETTER_ACQ*
- *HRS_APP_LETTER_ANO*
- *HRS_APP_LETTER_CR1*
- *HRS_APP_LETTER_IR*
- *HRS_APP_LETTER_LAQ*

Date Letter Printed Displays the date that the letter was printed. The system automatically populates this field after you generate the letter or when recruitment letters are printed using Print Recruitment Letters process.

Generate Letter Click this link to display a copy of the letter entered in the Letter field..

You can edit and print the letter. The system populates the Date Letter Printed field with the system date and the letter will display in the Contact History grid on the Manage Applicant page: Contact Notes tab.

Job Families

Use this grid to select one of more job families that the applicant is interested in. This information can be used as a means for searching for applicants that are interested in jobs within a specific job family. Job families are defined on the Job Family page.

Job Openings

Use this grid to link applicants to specific job openings. You can link the applicant to more than one job opening by clicking the Add Job Opening link.

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.

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Work Experience

Use this grid to display and define the applicant's work experience. This information can be used to screen applicants. This is compared to Years of Work Experience field entered in the Work Experience & Education grid on the Job Opening page.

Add Work Experience and **Edit Employment History** — Click these links to access either the Add Work Experience or Edit Work Experience page. Use these pages to enter new or edit existing work experience information.

Education Level

Use this group box to indicate the highest level of education attained by the applicant. Education levels are defined on the Content Item page using the content type *DEG*.

This information can be used to screen applicants. This is compared to the Highest Education Level field entered in the Work Experience & Education grid on the Job Opening page.

Primary Education

Use this grid to enter primary education information.

Add Primary Education and **Edit Primary Education** — Click these links to access either the Add Primary Education or Edit Primary Education page. Use these pages to enter new or edit existing primary education information.

Secondary Education

Use this grid to enter secondary education information.

Add Secondary Education and **Edit Secondary Education** — Click these links to access either the Add Secondary Education or Edit Secondary Education page. Use these pages to enter new or edit existing secondary education information.

Training

Use this grid to enter training information.

Licenses and Certificates

Use this grid to enter license and certificate information. This can be used to screen applicants. This information is compared with the licenses and certificates entered in the Licenses & Certificates grid on the Job Opening page.

Add Licenses and Certificates and **Edit Licenses and Certificates** — Click these links to access either the Add Licenses and Certificates or Edit Licenses and Certificates page. Use these pages to enter new or edit existing license and certificate information.

Languages

Use this grid to enter language information. This can be used to screen applicants. This information is compared with the languages entered in the Languages grid on the Job Opening page.

Add Languages and **Edit Languages** — Click these links to access either the Add Languages or Edit Languages page. Use these pages to enter new or edit existing language information.

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Memberships

Use this grid to enter membership information. This can be used to screen applicants. This information is compared with the languages entered in the Memberships grid on the Job Opening page.

Add Memberships and **Edit Memberships** — Click these links to access the Add Memberships or Edit Memberships page. Use these pages to enter new or edit existing membership information.

Honors and Awards

Use this grid to enter language information. This can be used to screen applicants. This information is compared with the honors and awards entered in the Honors & Awards grid on the Job Opening page.

Add Honors and Awards and **Edit Honors and Awards** — Click these links to access the Add Honors and Awards or Edit Honors and Awards page. Use these pages to enter new or edit existing honors and awards information.

Competencies

Use this grid to enter language information. This can be used to screen applicants. This information is compared with the competencies entered in the Competencies grid on the Job Opening page.

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

Use this grid to enter the applicant's priority placement information. This information is used by the Priority Placement process to identify applicants who should be considered as a candidate for a specific job opening. This information is compared to the priority placement codes entered in the Priority Placement Consideration grid on the Job Opening page.

Add Priority Placement and **Edit Priority Placement** — Click these link to access the Add Priority Placement or Edit Priority Placement page. Use these pages to enter new or edit existing priority placement information for the applicant.

(USF) Federal Preferences

Use this group box to enter federal preferences.

Federal Civilian Employee — Select the appropriate check box to indicate whether the applicant is a current or previous employee of the federal government or an agency.

This information can be used to screen applicants. The check boxes that are selected here are compared to the Recruiting Type field on the Job Opening page.

Highest Pay Plan and **Highest Grade** — 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 that the applicant will accept.

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Minimum Acceptable Grade Select the minimum pay grade that the applicant will accept.

Minimum Acceptable Grade can be used to screen applicants. This field is compared to the Minimum Pay Grade field on the Job Opening page.

Highest Career Tenure Select the applicant's highest career tenure. Values are *Conditional, Indefinite, None,* and *Permanent.* This field is used for reduction in force.

Veterans Preference Select the veterans hiring preference that applies. Veterans preference values are defined on the Setup Veterans Preference page.

Reserve Category Select the employee's reserve category, or select *Not Applicable.*

Uniformed Service Select the type of uniformed service in which this veteran served. Values are: *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.

This field can be used to screen applicants. This field is compared to the Draft Status field on the Job Opening page.

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.

Entering References

This section discusses how to enter or request reference information.

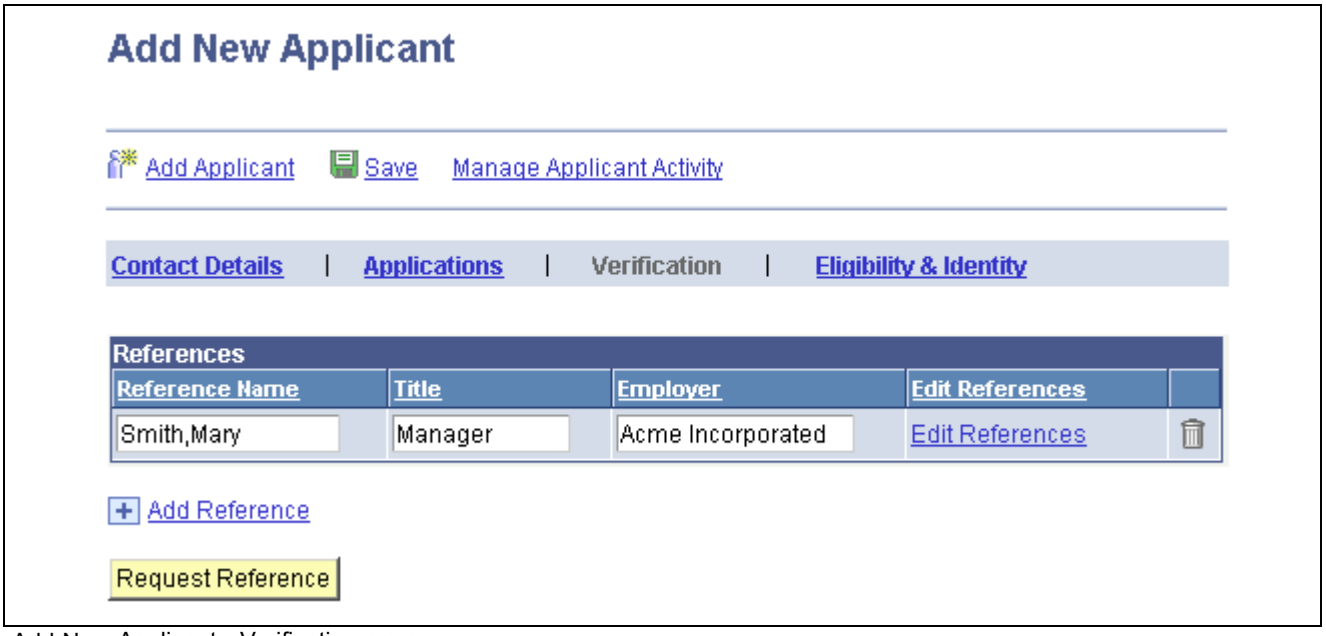
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Pages Used to Enter References

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, Edit Reference Details	HRS_APP_REF_SEC	• Click the Add Reference link on the Add New Applicant - Verification page. • Click the Edit Reference link on the Add New Applicant - Verification page.	Add or edit reference information.

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.

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Request Reference 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 9.0 PeopleBook*, "Using Candidate Gateway".

Use the message catalog to modify the message.

Entering Applicant Eligibility and Identity Information

This section discusses how to add eligibility and identity information.

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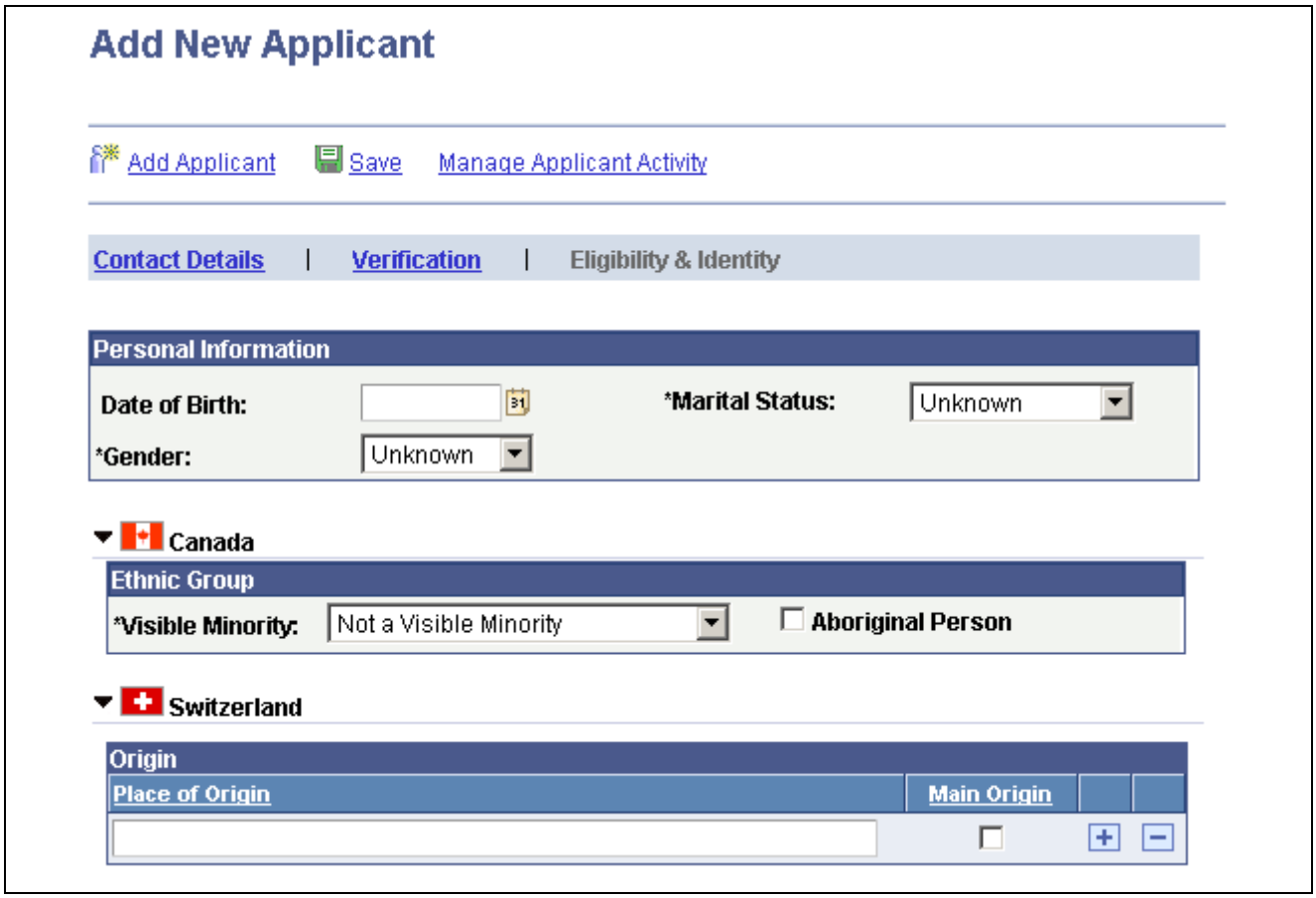
Pages Used to Enter Applicant Eligibility and Identity Information

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.
Add National ID, Edit 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.	Enter national ID information for an applicant.
Add Citizenship, Edit Citizenship	HRS_APP_CIT_PSP1	• Click the Add Citizenship link on the Add New Applicant - Eligibility & Identity page. • Click the Edit Citizenship Details link on the Add New Applicant - Eligibility & Identity page.	Enter citizenship information for an applicant.
Add Visa Permit Details, Edit Visa Permit Details	HRS_APP_VSA_PMT1	• Click the Add Visa Permit link on the Add New Applicant - Eligibility & Identity page. • Click the Edit Visa Permit Details link on the Add New Applicant - Eligibility & Identity page.	Enter visa permit information for an applicant.
Add Bank Account, Edit 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.	Enter bank account information for an applicant.

Adding Eligibility and Identity Information

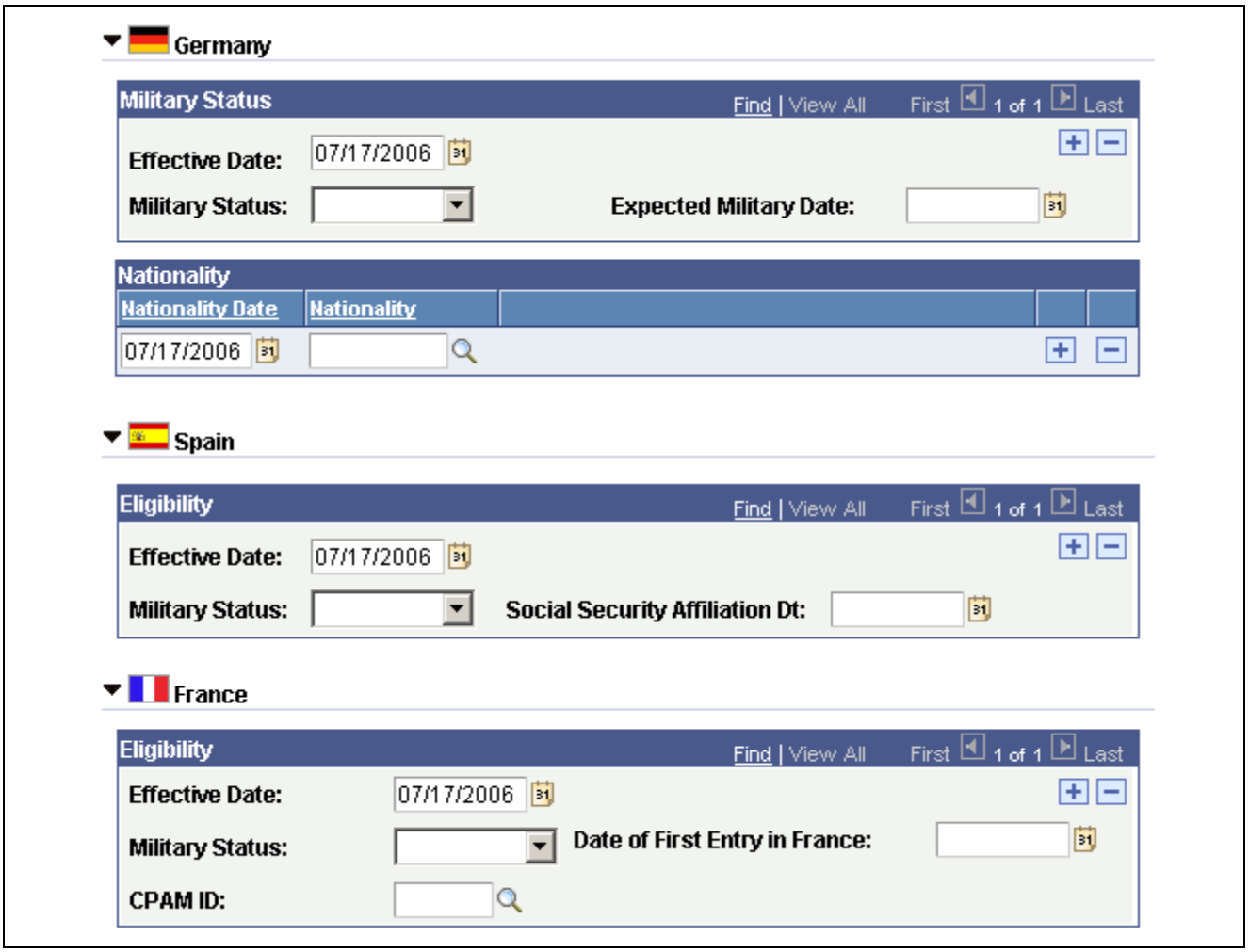
Access the Add New Applicant - Eligibility & Identity page.

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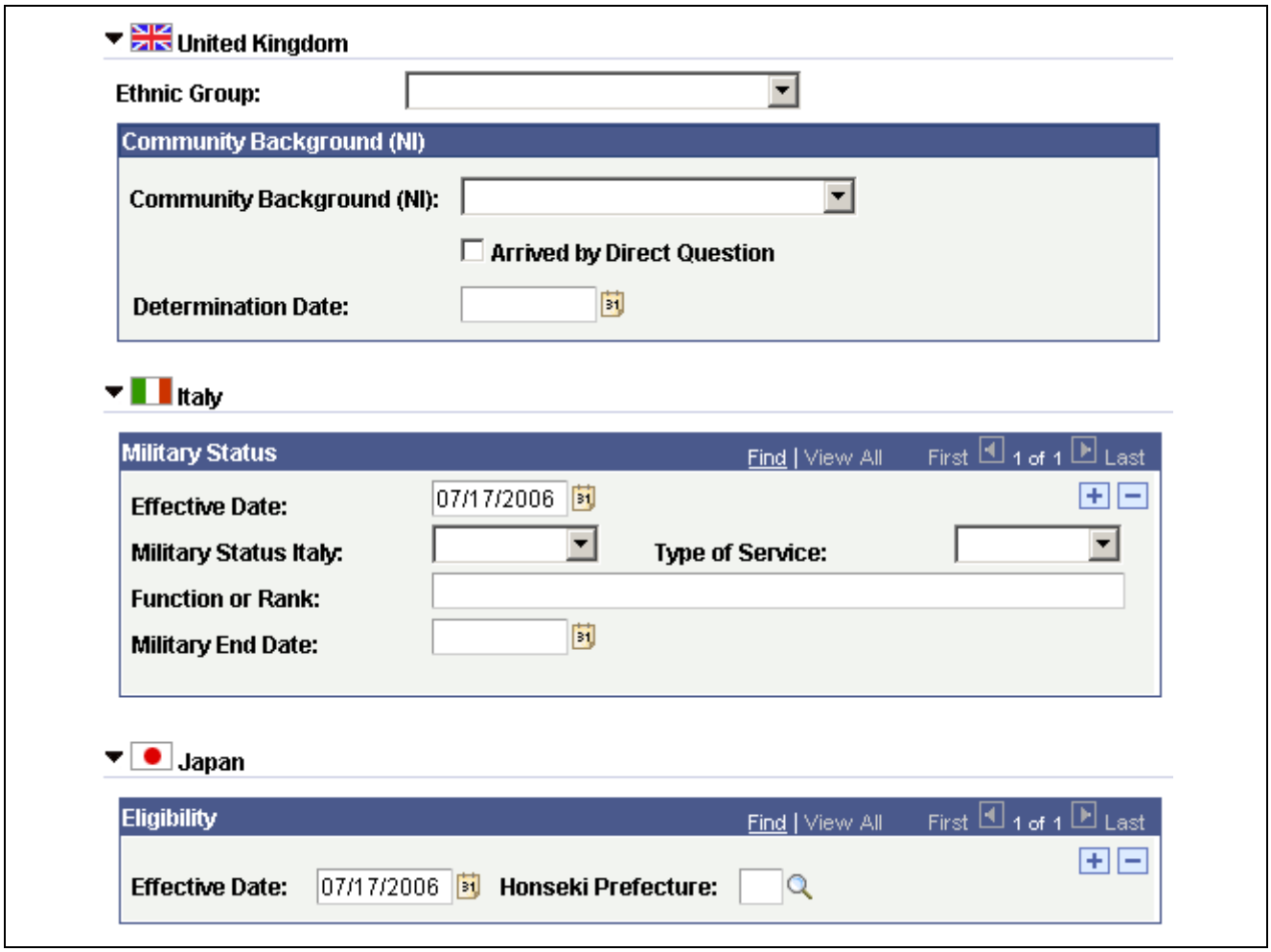
Add New Applicant - Eligibility & Identity page (1 of 11)

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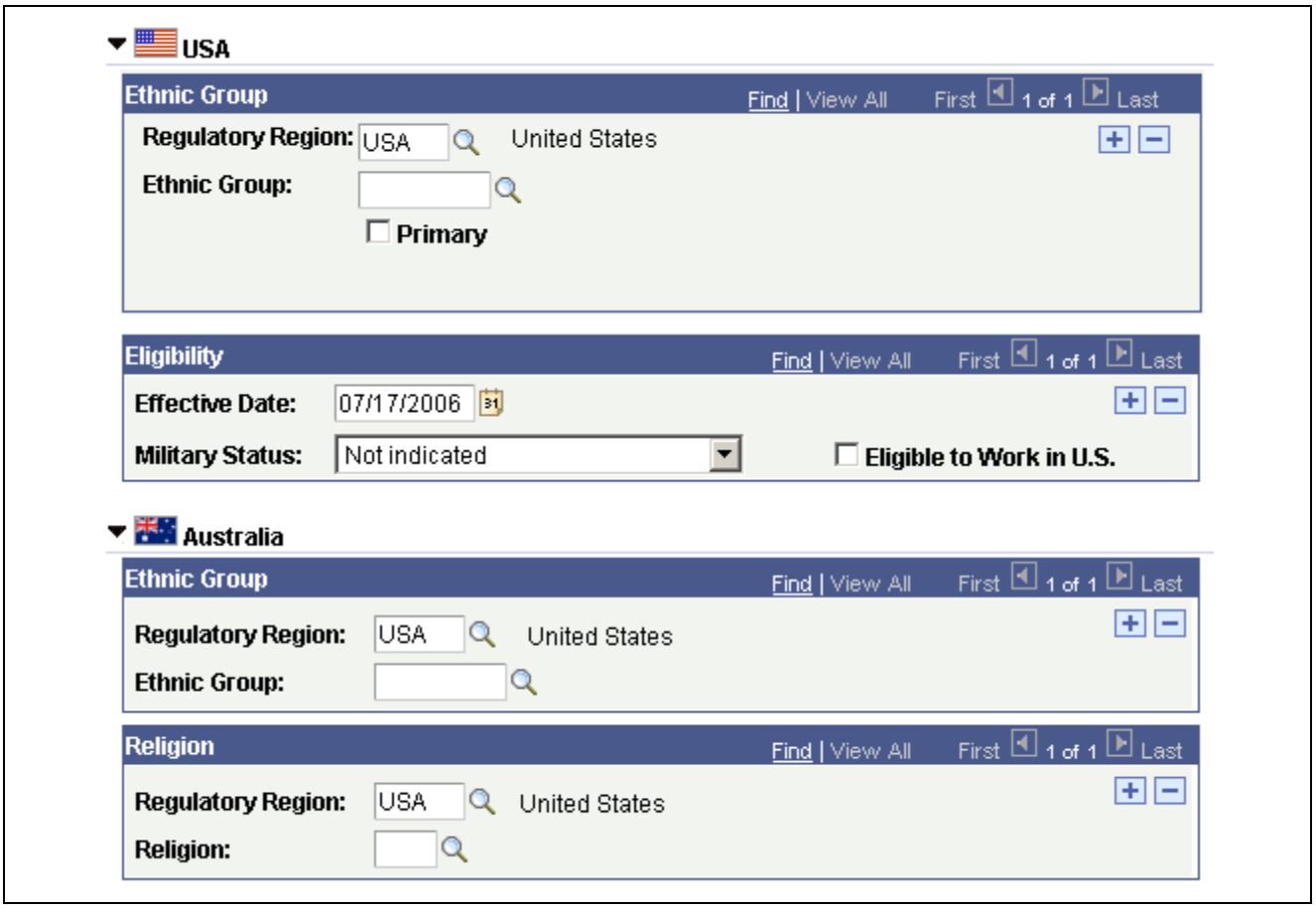
Add New Applicant - Eligibility & Identity page (2 of 11)

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Add New Applicant - Eligibility & Identity page (3 of 11)

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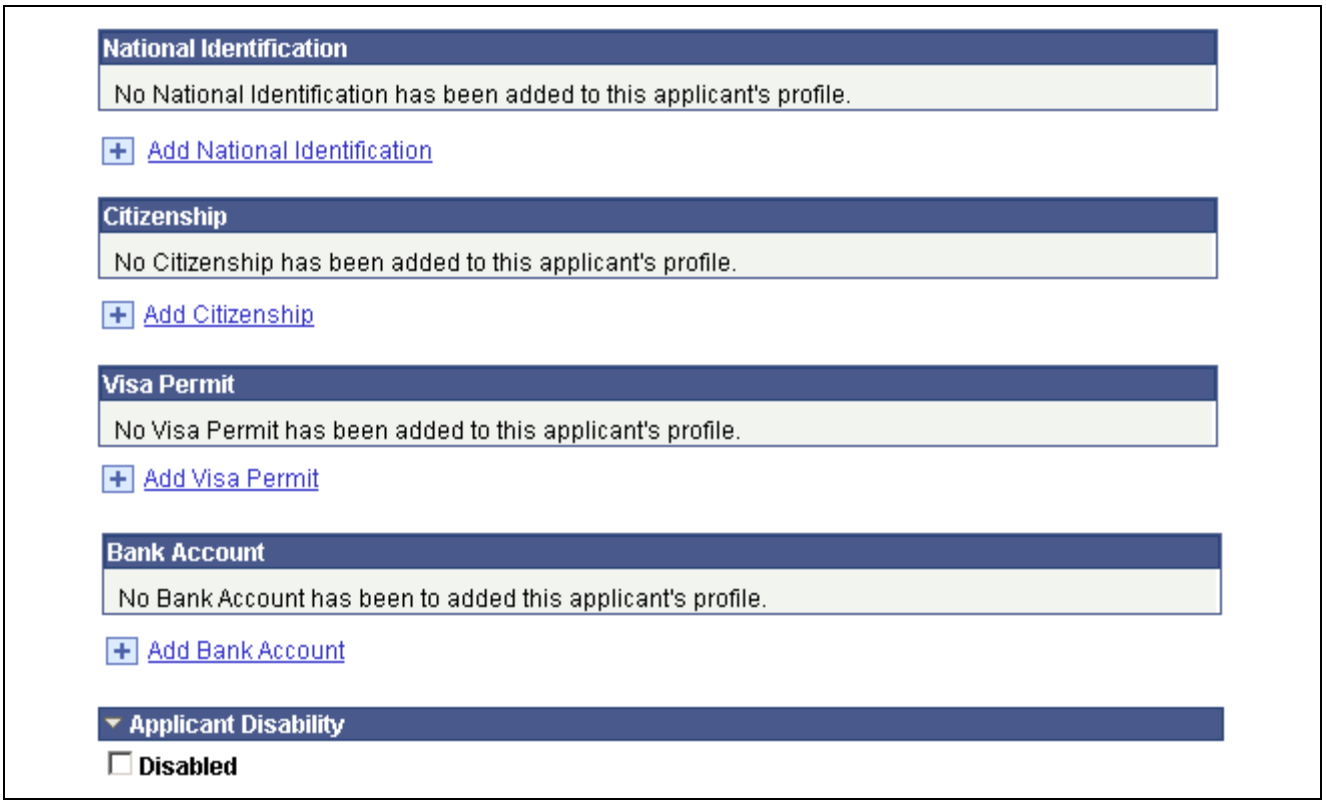
Add New Applicant - Eligibility & Identity page (4 of 11)

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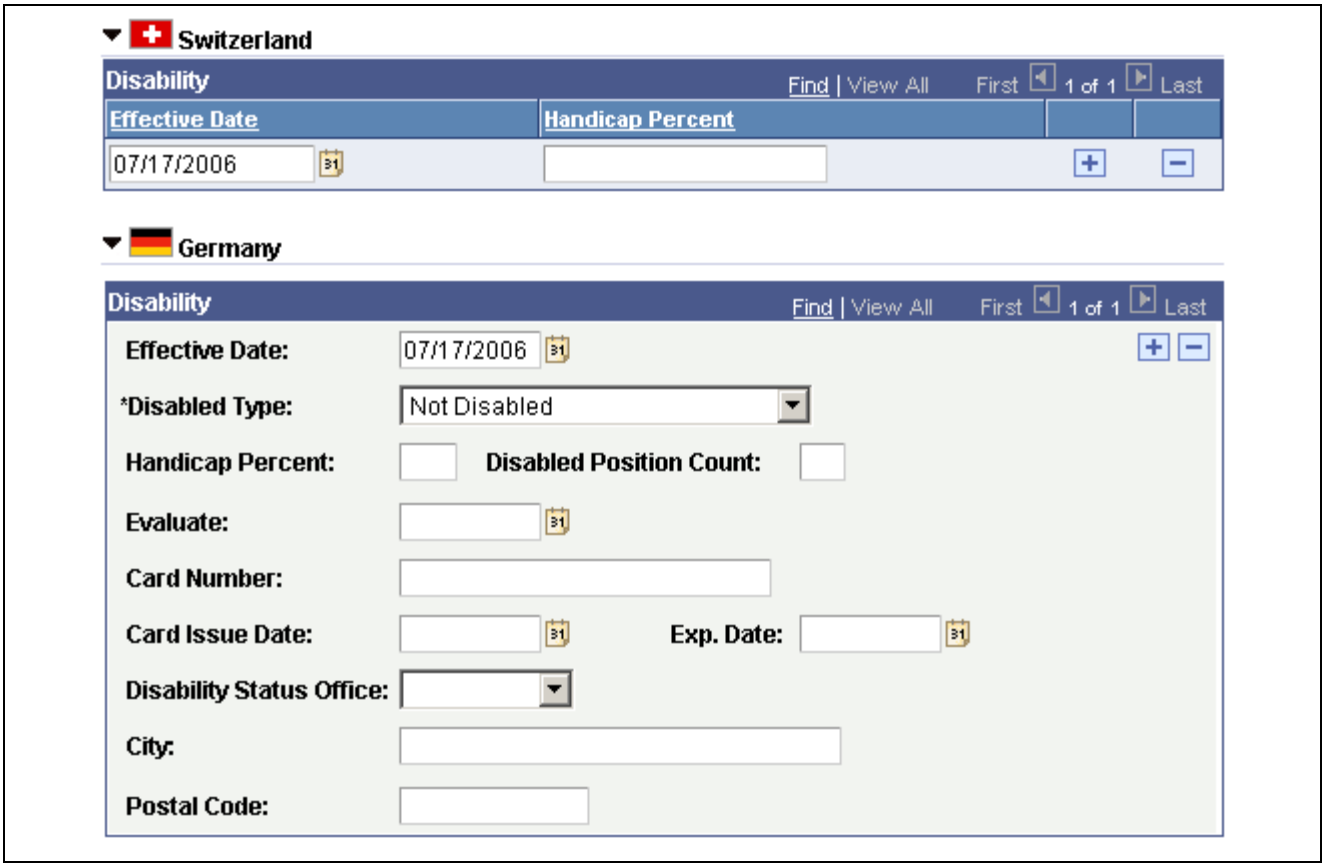


Add New Applicant - Eligibility & Identity page (5 of 11)

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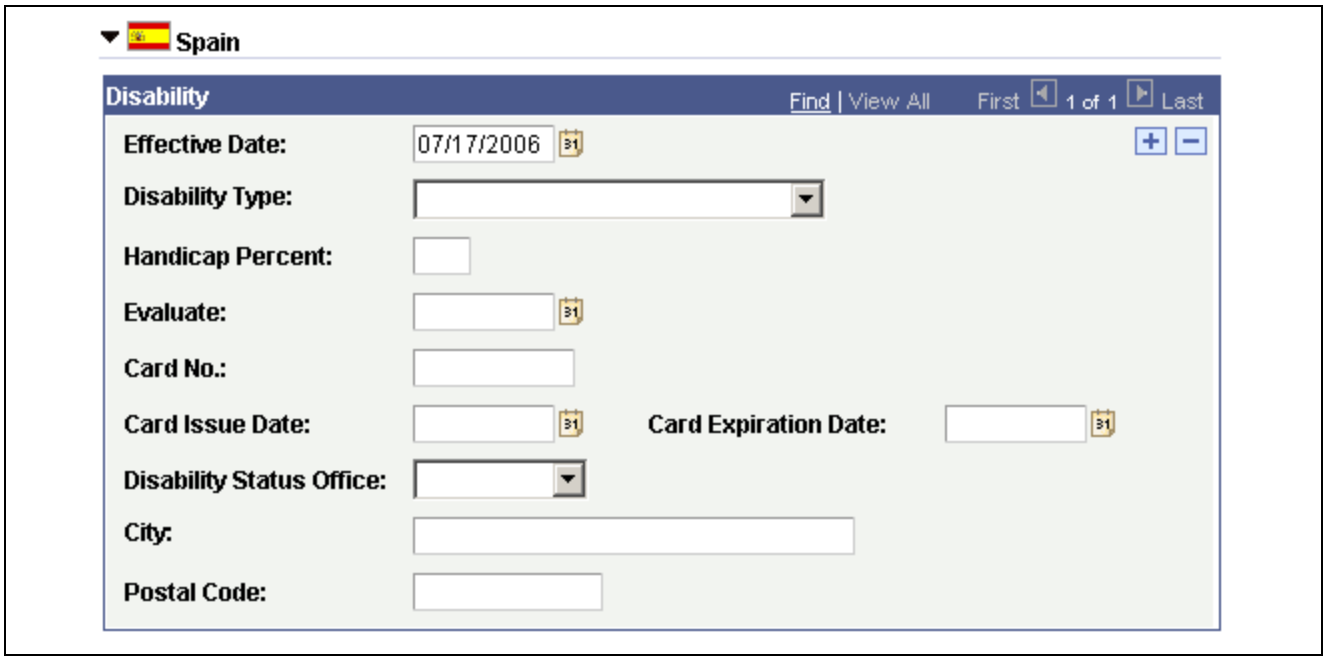


Add New Applicant - Eligibility & Identity page (6 of 11)

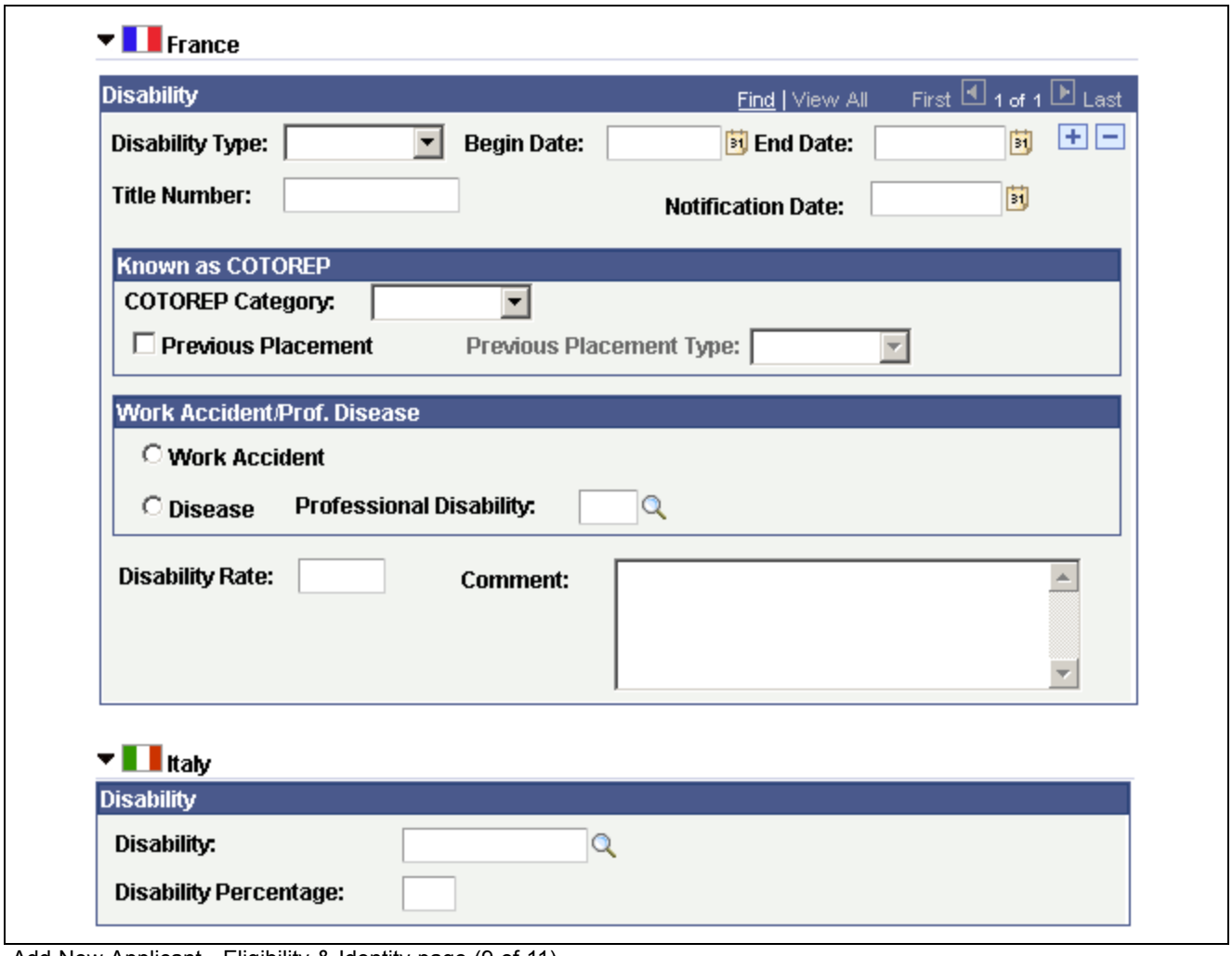


Add New Applicant - Eligibility & Identity page (7 of 11)

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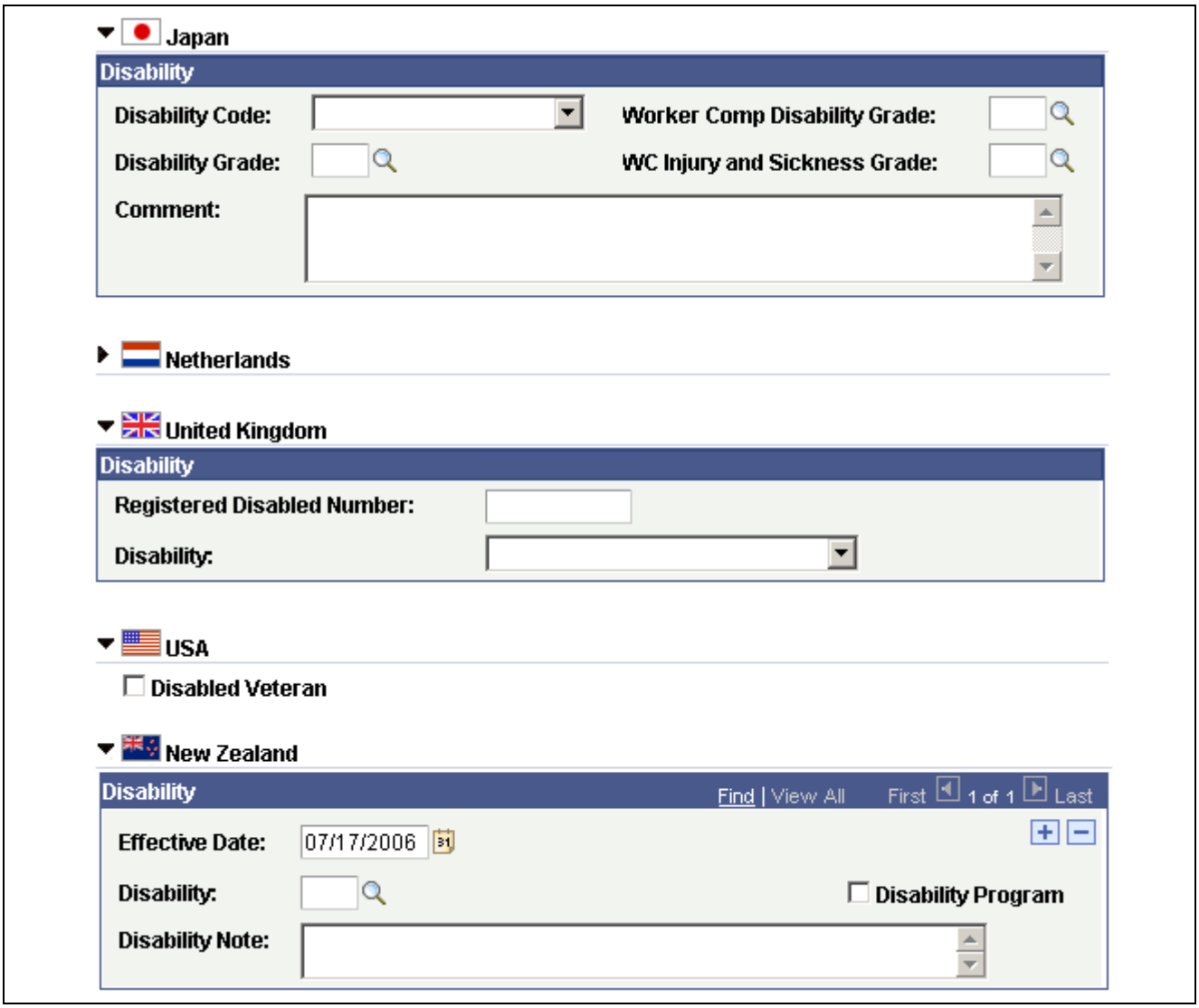


Add New Applicant - Eligibility & Identity page (8 of 11)



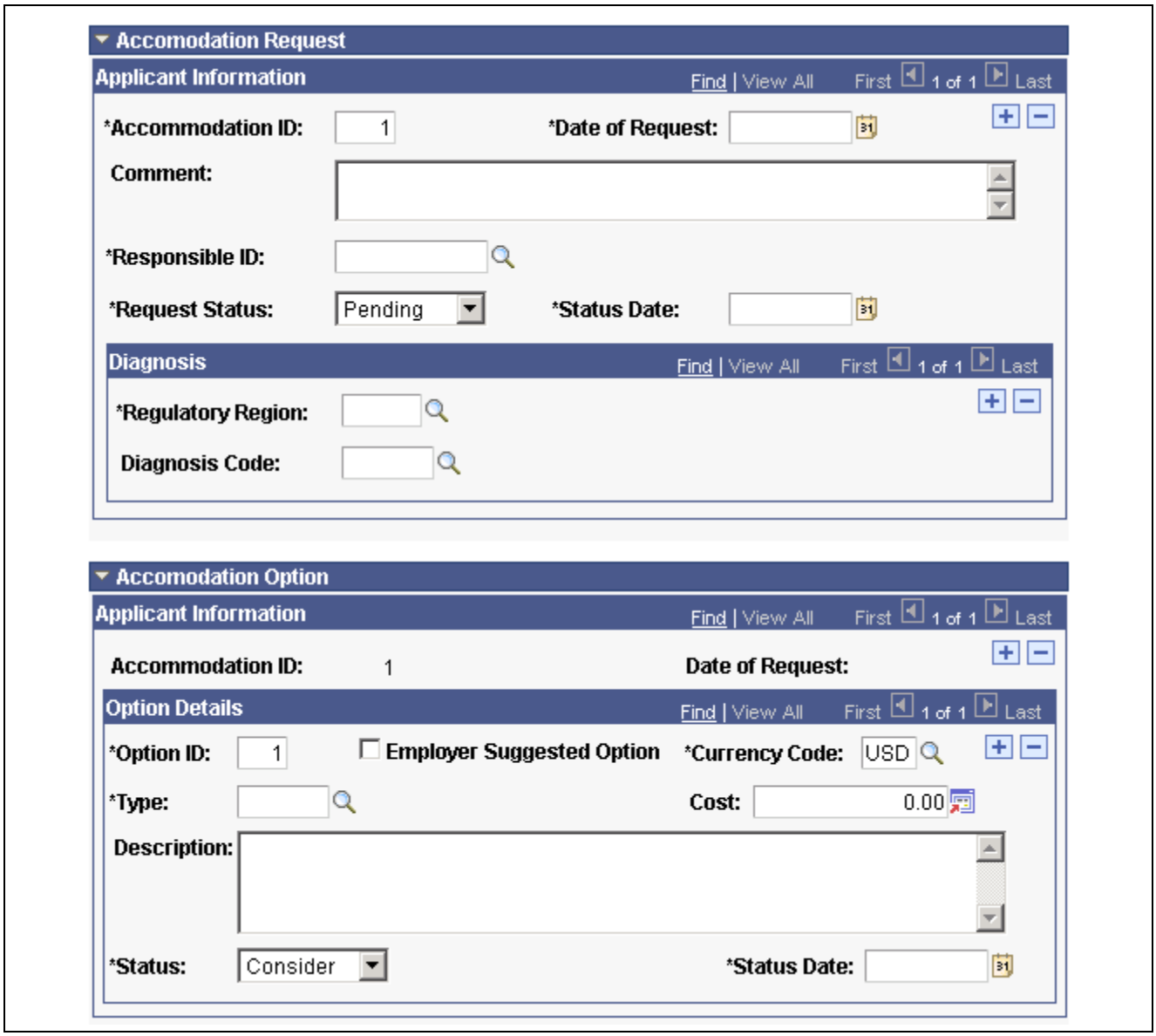
Add New Applicant - Eligibility & Identity page (9 of 11)

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Add New Applicant - Eligibility & Identity page (10 of 11)

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Add New Applicant - Eligibility & Identity page (11 of 11)

Personal Information

Use this group box to enter date of birth, gender, marital status, and country-specific personal information.

Date of birth and gender can be used to screen applicants. Date of birth is used to calculate the applicant's age and is compared to the Maximum and Minimum Age fields on the Job Opening page.

For USA only, military status can also be used to screen applicants. Military status is compared to the Draft Status field on the Job Opening page.

See *PeopleSoft Enterprise Human Resources 9.0 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.

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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 9.0 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 9.0 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 9.0 PeopleBook: Meet Regulatory Requirements*, "(GBR, USA, and USF) Meeting Disability Regulatory Requirements," Entering Accommodation Options.

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CHAPTER 8

Screening and Routing Applicants

This chapter discusses how to:

- Screen applicants.
- Route applicants.

Screening Applicants

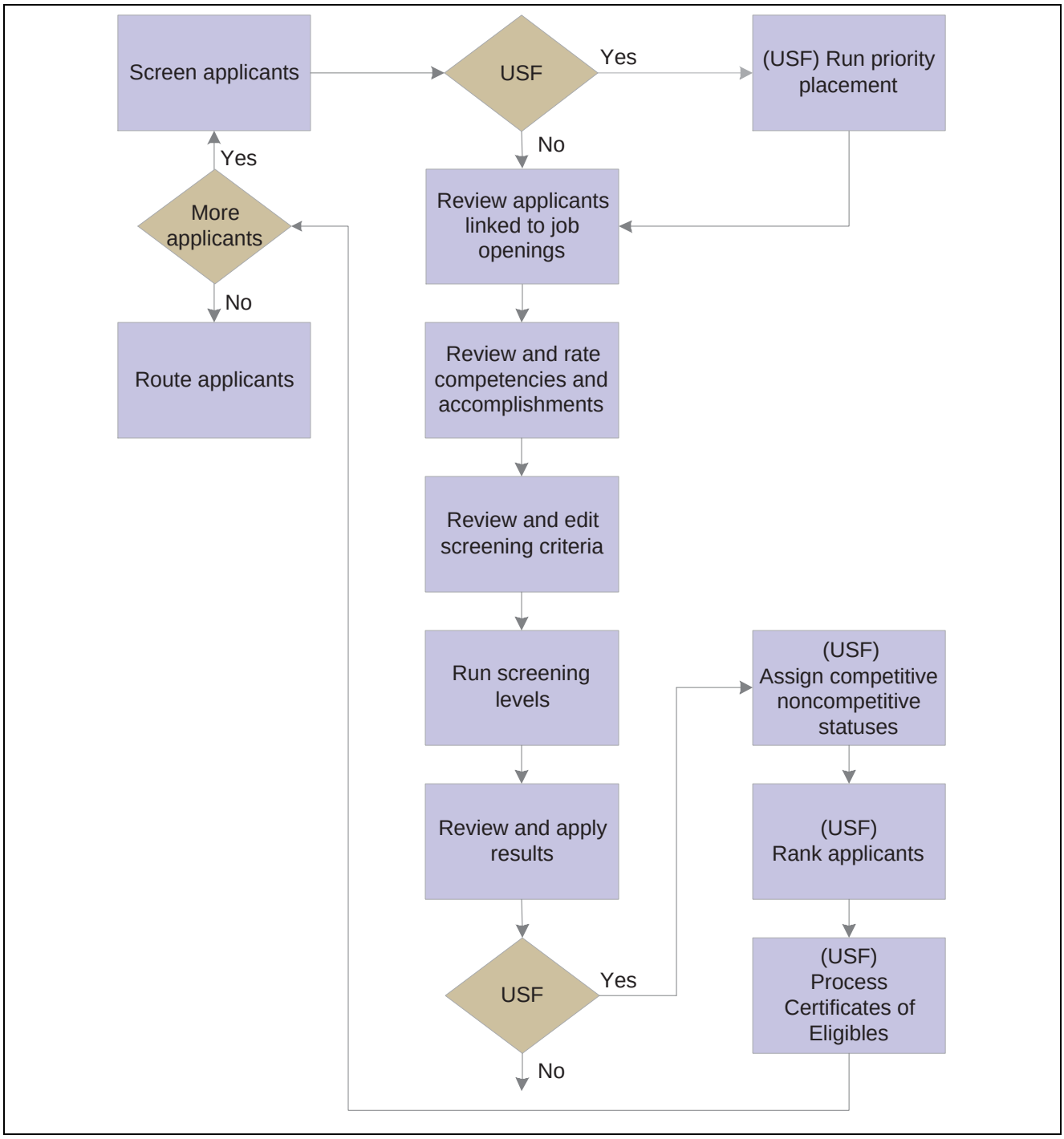
This section provides an overview of the screening process, describes the prerequisites for screening applicants, and discusses how to:

- (USF) Run priority placement.
- Review applicants linked to job openings.
- Rate applicants.
- Review and edit screening levels and criteria.
- Run screening levels.
- Review and apply results.
- (USF) Assign competitive and noncompetitive statuses.
- (USF) Rank applicants.
- (USF) Process Certificate of Eligibles.

Understanding the Screening Process

Screening is the process used by recruiters to evaluate a list of potential candidates and narrow the list to a few qualified applicants that can be interviewed or hired. The following diagram illustrates the PeopleSoft screening process:

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Process flow for screening applicants

(USF) Running Priority Placement

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.

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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.

Reviewing Applicants Linked to Job Openings

Before you begin running screening levels, you may want to check the list of applicants linked to a job opening. This will tell you the number of candidates with which you will be processing.

If you want more applicants linked to this job opening, consider running an applicant search to match applicants qualifications to the job opening criteria. If you find new applicants, link them to the job opening.

See Chapter 14, "Managing Applicants," Searching for Applicants, page 281.

See Chapter 14, "Managing Applicants," Linking Applicants to Job Openings, page 324.

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.

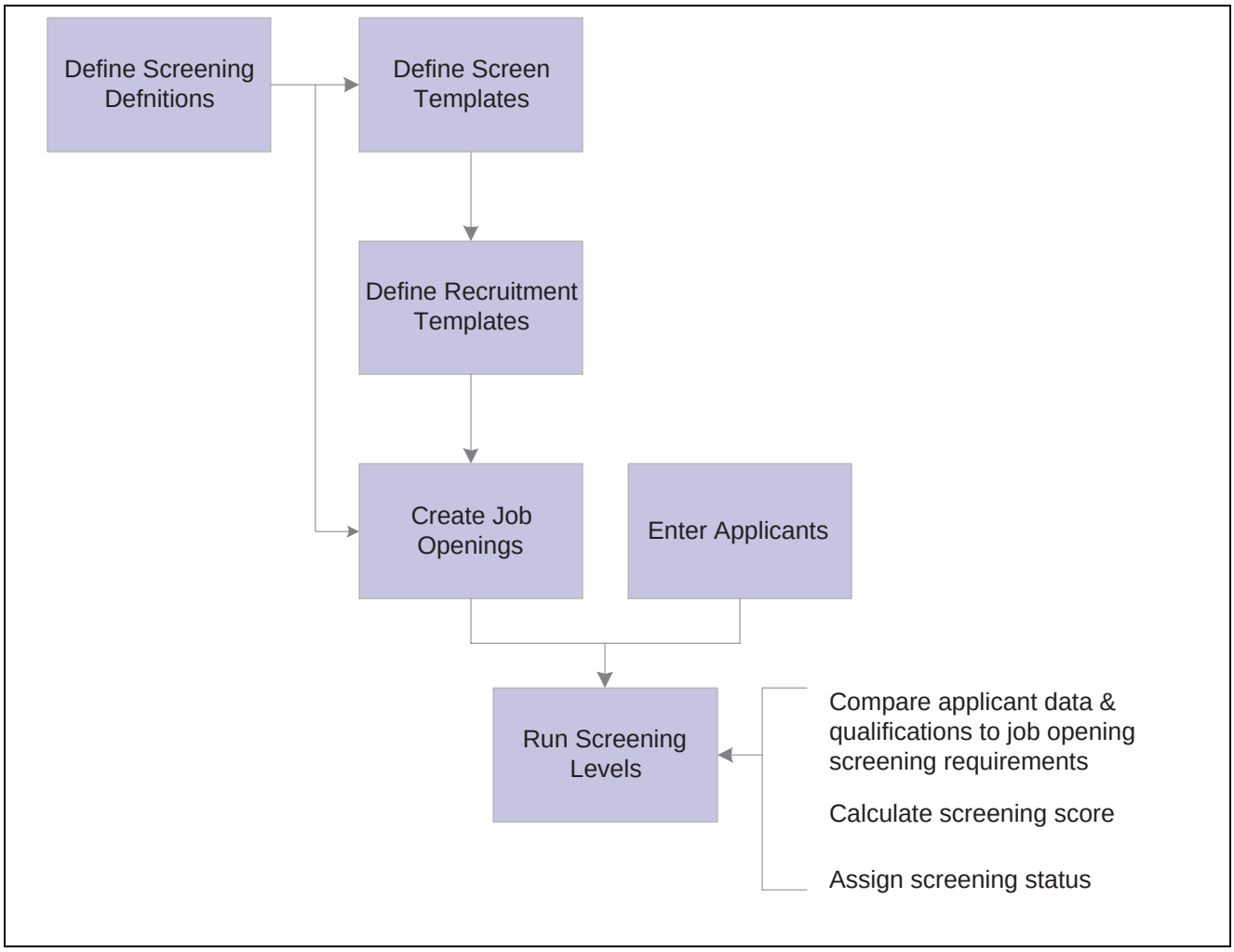
Reviewing and Editing Screening Level and Criteria

Based on the applicants that have applied for the job opening, you may need to revise the screening criteria to either increase or decrease the number of applicants.

Running Screening Levels

The following diagram illustrates the parameters the system uses to run a screening level:

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Running Screening Levels

Screening levels are run using the Screen Applicants, Screening Levels, and Screening Results pages. Make sure the screening levels are run in the order in which they are listed in the Applicant Screening group box on the Job Opening page.

If the Must Pass Previous Level check box is selected in the Applicant Screening group box on the Job Opening page, the system looks at applicant's screening status to see if it is Pass or Fail. If the applicant failed the previous screening level, the system stops processing that applicant and moves on to the next applicant in the list. If there was a letter defined in the Screening Option Description on the Job Opening Screening Criteria page, the system creates a letter that can be printed using the Print Recruitment Letters component.

The system determines which screening criteria is to be used by checking to see if the Use in Screening check box is selected on the Job Opening Screening Criteria page. If the box is selected, the system looks for the corresponding field in the applicant's data. If a match is found, the points are added to the applicant's score in the appropriate category.

For Federal users, the system also considers whether the Augment or Selective check boxes are selected to determine which category the points should be placed.

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The last step is to determine the applicant's screening status. The system looks at the rules defined in Scoring Definition group box on the Job Opening Screening Criteria page. Based on those parameters, the system will assign a screening status. However, if the Manually Assign Status check box is selected in the Scoring Definition group box on the Job Opening Screening Criteria page, the recruiter or administrator can assign the status using the Screening Results page.

Reviewing and Applying Screening Results

After the screening levels have been run, review the results. If you are satisfied, then apply those results, by clicking the apply button. The system then writes the scores to the applicant's record.

(USF) Assigning Competitive/Noncompetitive Statuses

This is a process where you assign a competitive or noncompetitive status to the applicants.

(USF) Ranking Applicants

After evaluating and qualifying the applicants, rank the applicants according to the category you defined on the screening template.

(USF) Applying Tie Breakers

If two or more applicants have the same score in the same category, you can apply one of three tie-breaker methods:

- Augmenting Factors, which uses criteria identified as Augmenting on the screening criteria.
- Name Request, which uses the name you entered on the job opening.
- Random Number, which uses an algorithm based on the OPM definitions.

(USF) Processing Certificate of Eligibles

After you have ranked the applicants, you are ready to certify the best-qualified applicants for the position. The OPM regulates the definition of eligibles and the order in which they should appear on the certificate. Once you create the certificate, use the Certificate of Eligibles component to print it.

Prerequisites

Before you begin running screening levels:

1. (USF) Define priority placement codes.
2. (USF) Define veteran preference codes.
3. Define screening definitions.
4. Create screening templates.
5. Link screening templates to recruitment templates.
6. Create job openings.
    a. Define job requirements.
    b. Define screening criteria for each screening level.

See Chapter 2, "Setting Up Recruiting Processes," Understanding Screening Definitions, page 29.

See Chapter 3, "Setting Up Recruiting Templates," Setting Up Screening Templates, page 55.

See Chapter 3, "Setting Up Recruiting Templates," Setting Up Recruitment Templates, page 60.

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See Chapter 6, “Creating Job Openings,” Adding Screening Criteria to Screening Levels, page 145.

See Chapter 2, “Setting Up Recruiting Processes,” (USF) Setting Up Priority Placement Codes, page 34.

Pages Used to Screen 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 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.
Screen Applicants - View All Applicants	HRS_JO_SCR_LIST	Click the Screen Applicants link on the Job Opening page.	Review applicants linked to a job opening 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.
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.
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.
Rank Applicants	HRS_JO_RANK	Click the Rank Applicants button on the Screen Applicants - View All Applicants page.	Rank applicants.

(USF) Running Priority Placement

To run the Priority Placement (HRS_PRI_PLCM) process:

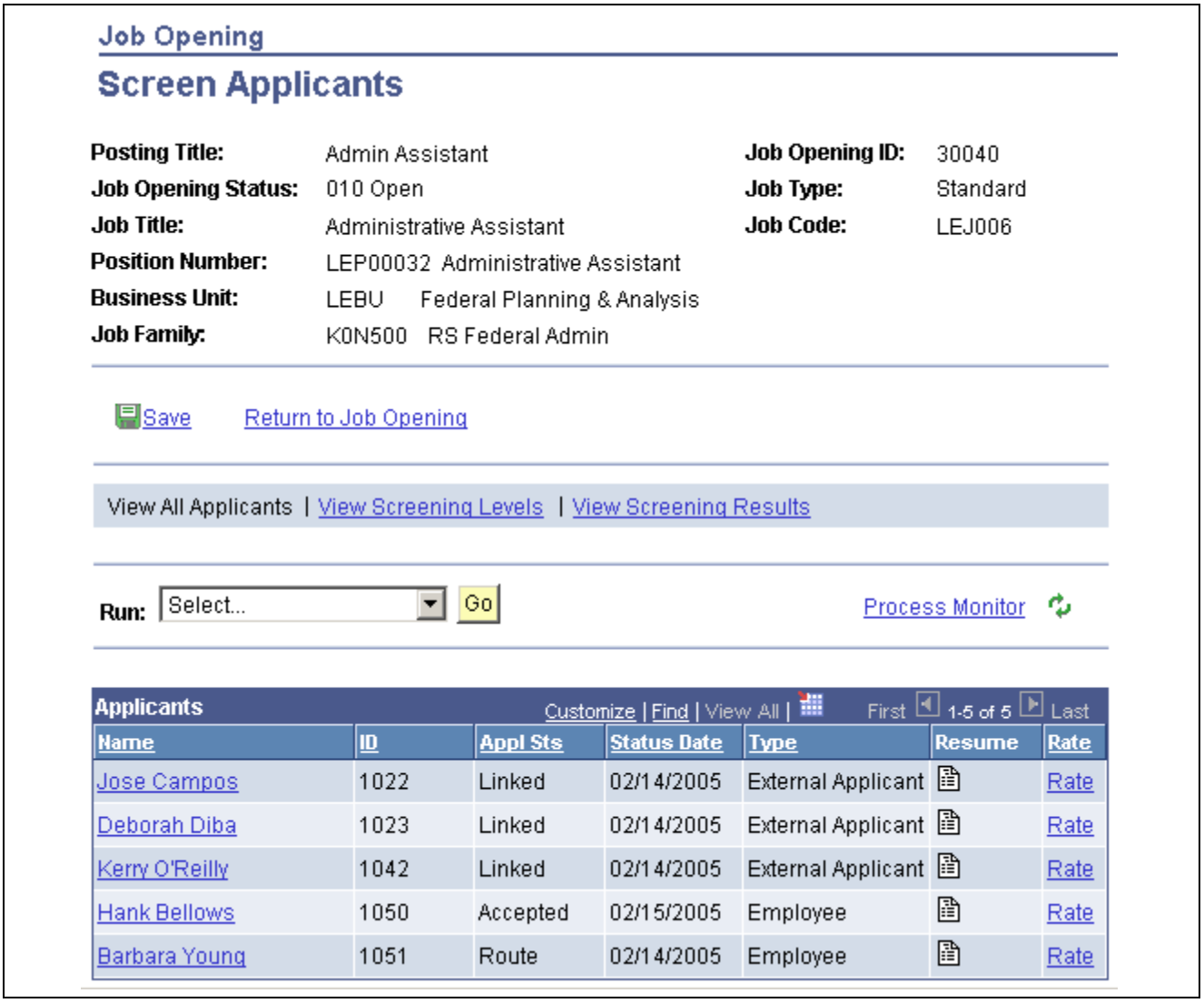
1. Access the Screen Applicants - View All Applicants page.
2. In the Run field, select *Priority Placement*.
3. Click the Go button.

After the process has completed, the system displays a message next to the Go button stating the process has been run. If applicants were found that matched the priority placement code assigned to the job opening, their names will appear in the Applicants grid.

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Reviewing Applicants Linked to Job Opening

Access the Screen Applicants - View All Applicants page.



Screen Applicants page

View All Applicants Click this link to refresh the current page.

View Screening Levels Click this link to access the Screening Levels page.

View Screening Results This link displays if a screening level has been run.
Click this link to access the Screening Results page.

Run Select the screening level you want to run.

Go Click the Go button to execute the screening level selected in the Run field.

(USF) Rank Applicants This button displays if a screening level has been run.
Click this link to display the Rank Applicants page.

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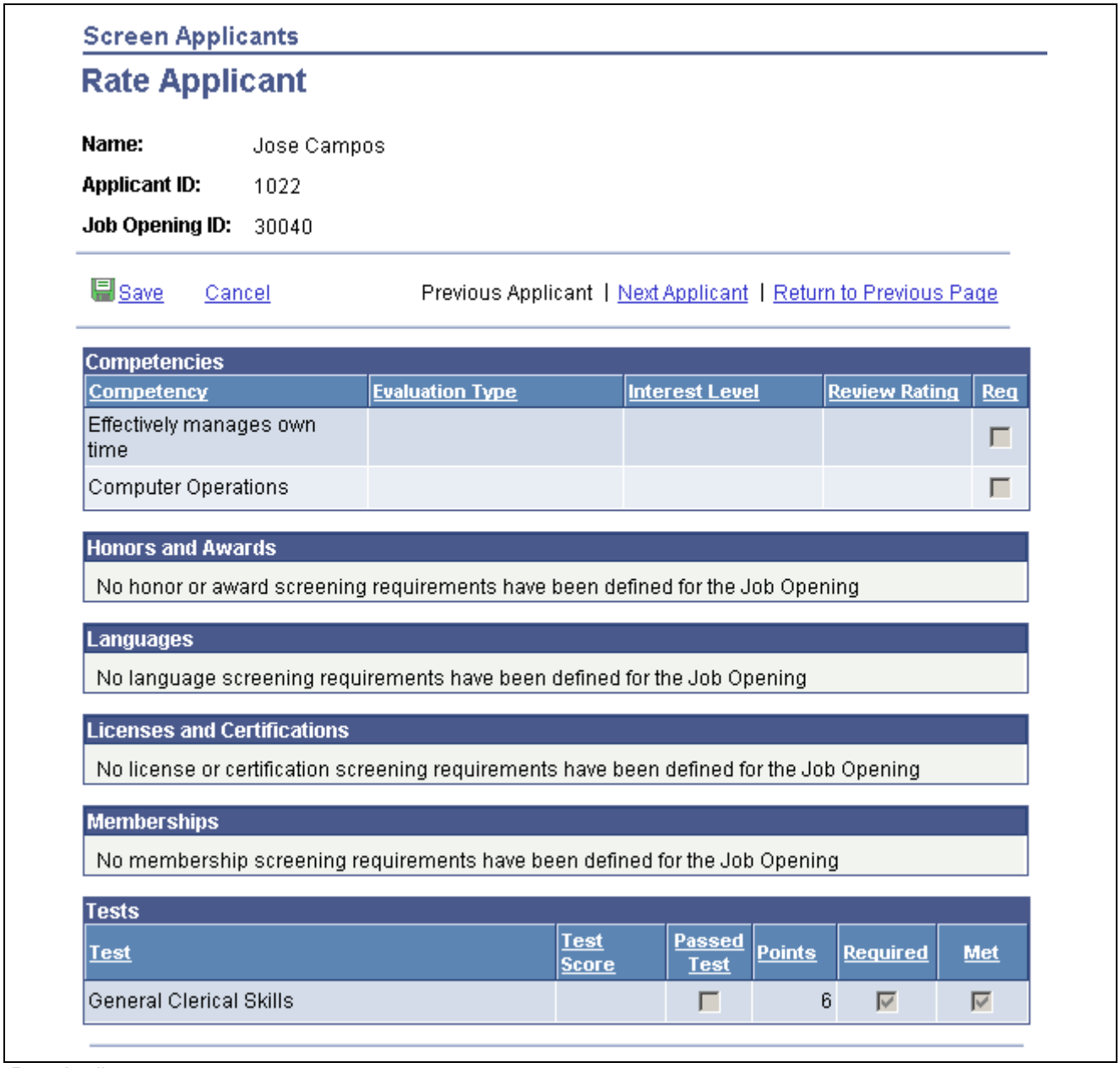
Applicants

This group box lists all applicants linked to the job opening.

Name	Click the name link to access the Manage Applicant page.
Resume	Click the Resume icon to access the Manage Applicant - Resume page.
Rate	Click to access the Rate Applicants page.

Rating Applicants

Access the Rate Applicant page.



Rate Applicant page

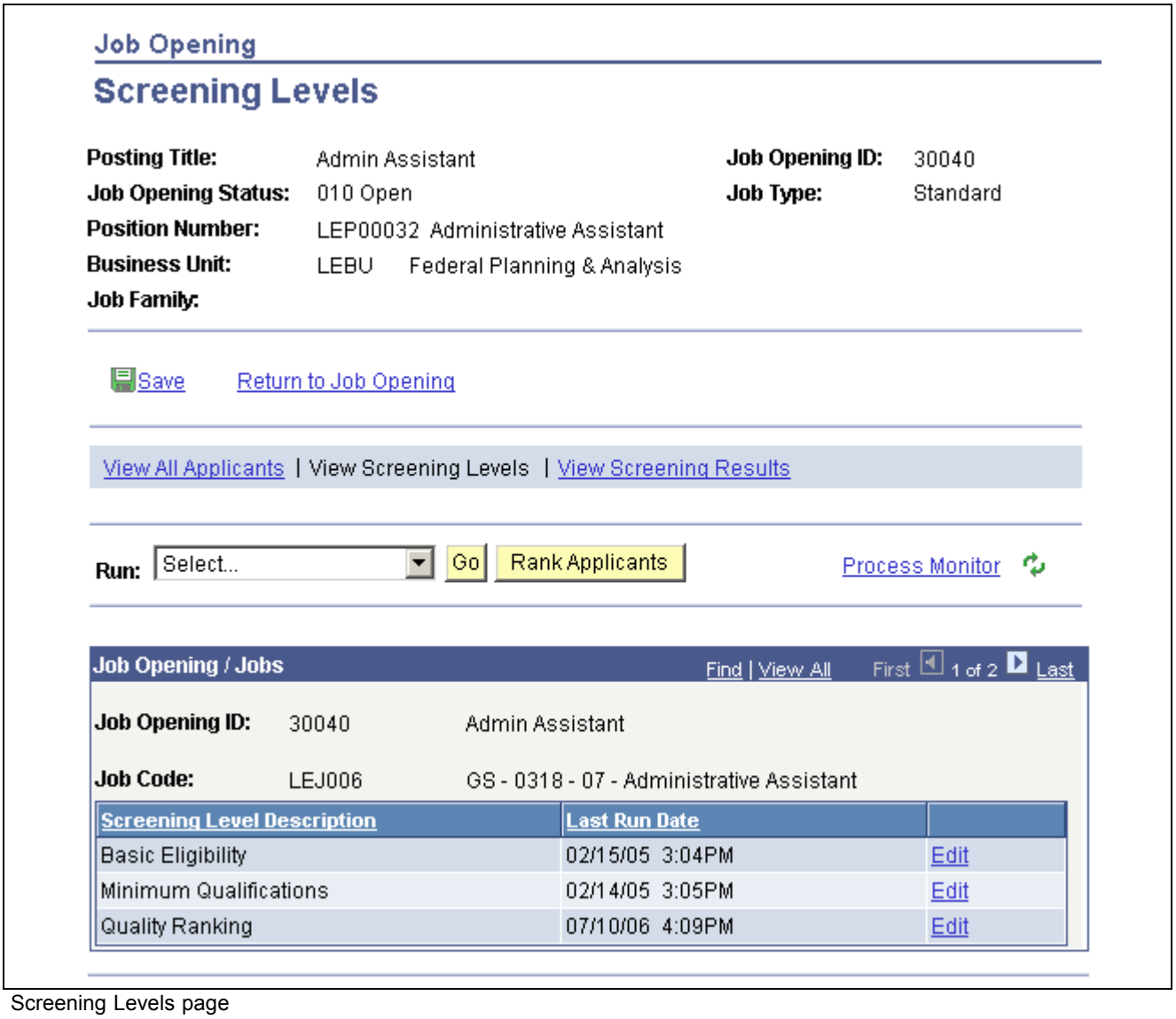
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Use this page to review the competencies and accomplishments that were identified as part of the screening criteria and to enter a rating for the applicant if the system could not verify that the applicant met this requirement.

Save	If you manually rate the applicant, click Save to save your ratings.
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

Access the Screening Levels page.



Screening Levels page

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Job Opening / Jobs

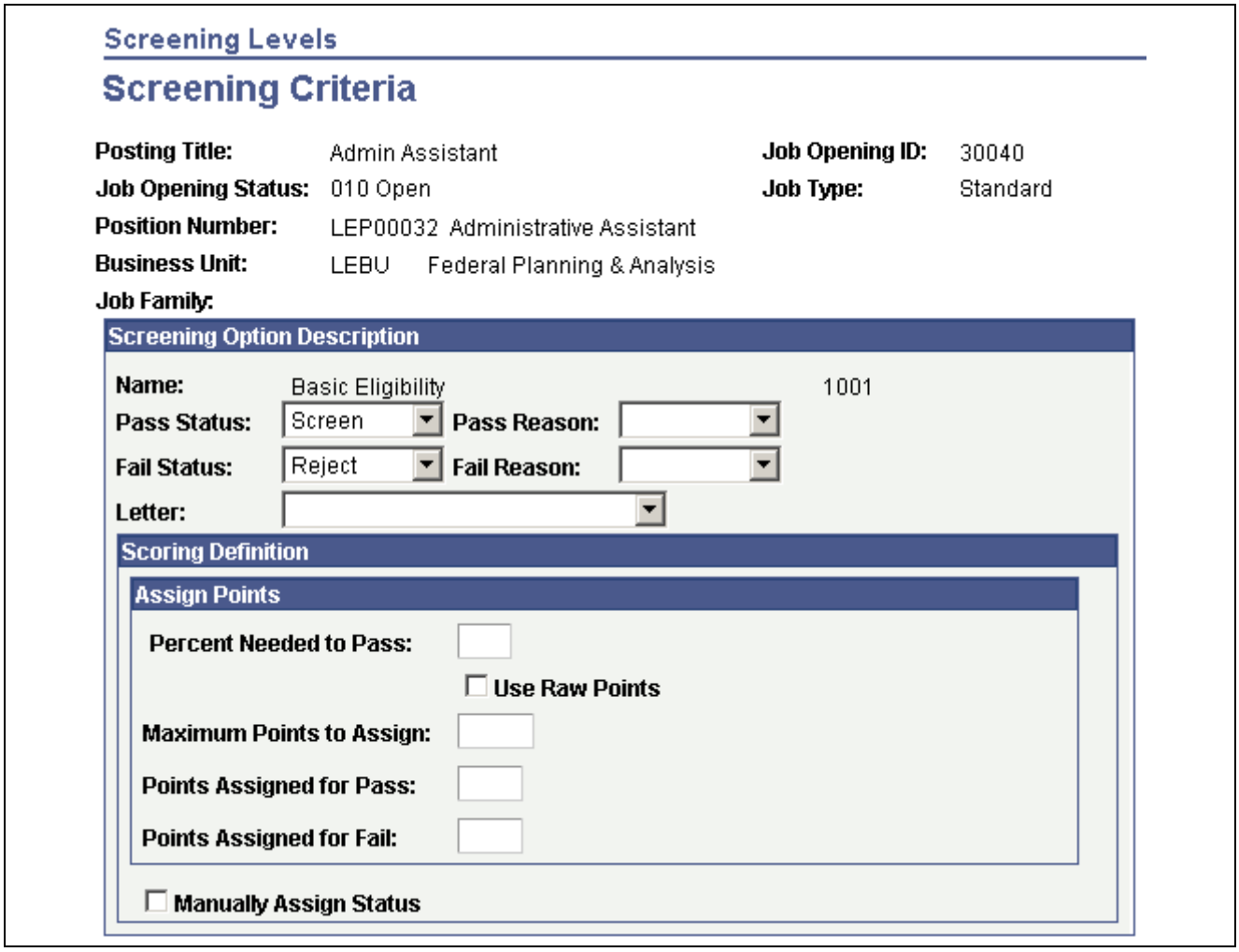
This group box displays the information about the job opening and the screening levels associated with the job opening. If there are multiple job associated with the job opening, you can select the next job opening in the scroll area.

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.

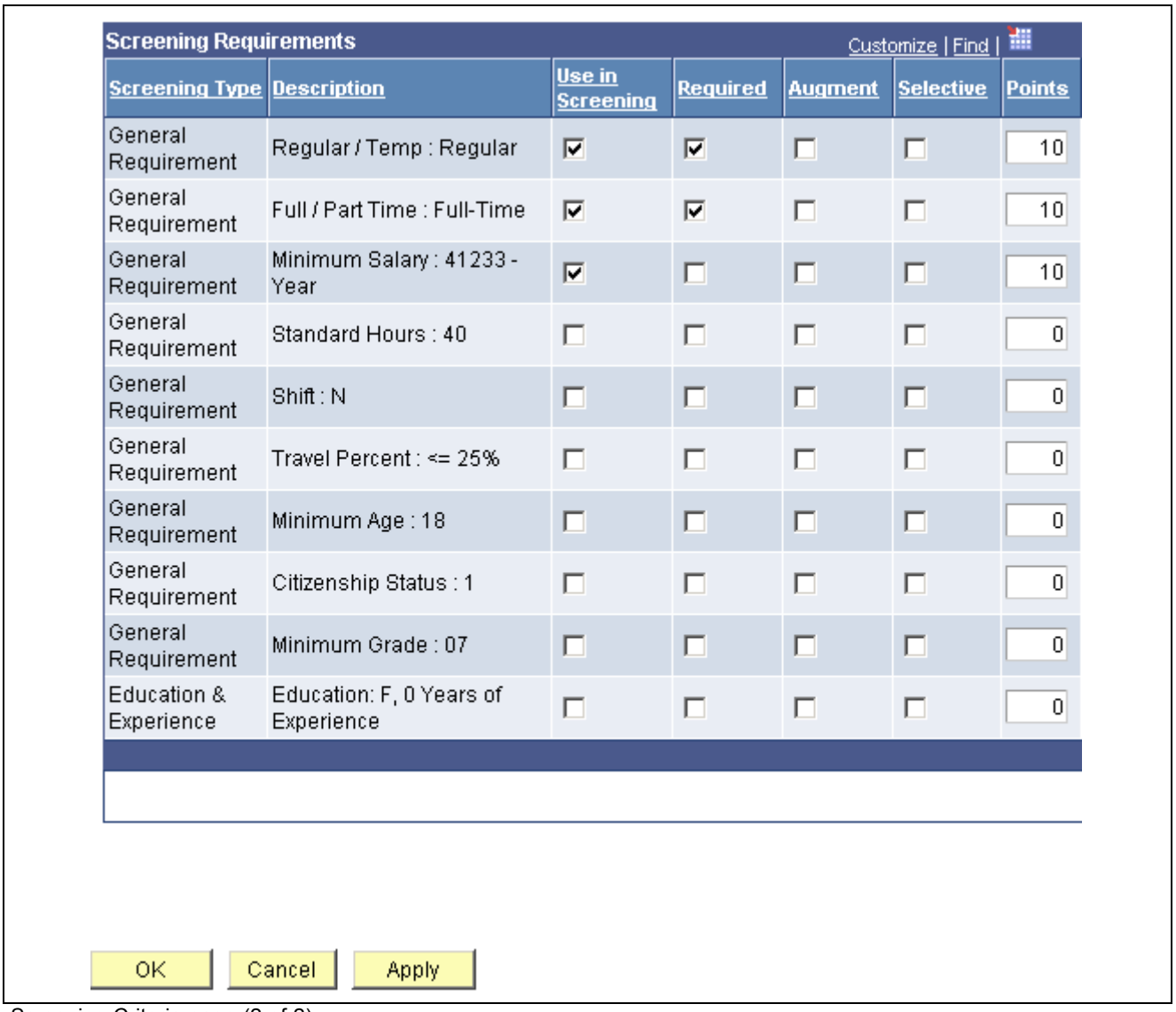
Reviewing and Editing Screening Criteria

Access the Screening Criteria page.



Screening Criteria page (1 of 2)

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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, you must use the Job Opening page.

See Chapter 6, "Creating Job Openings," Adding Screening Criteria to Screening Levels, page 145.

Running Screening Levels

To run a screening level:

1. Access the Screen Applicants page.
2. Select the screening level in the Run field
3. Click the Go button.

See Viewing Applicants Linked to Job Openings

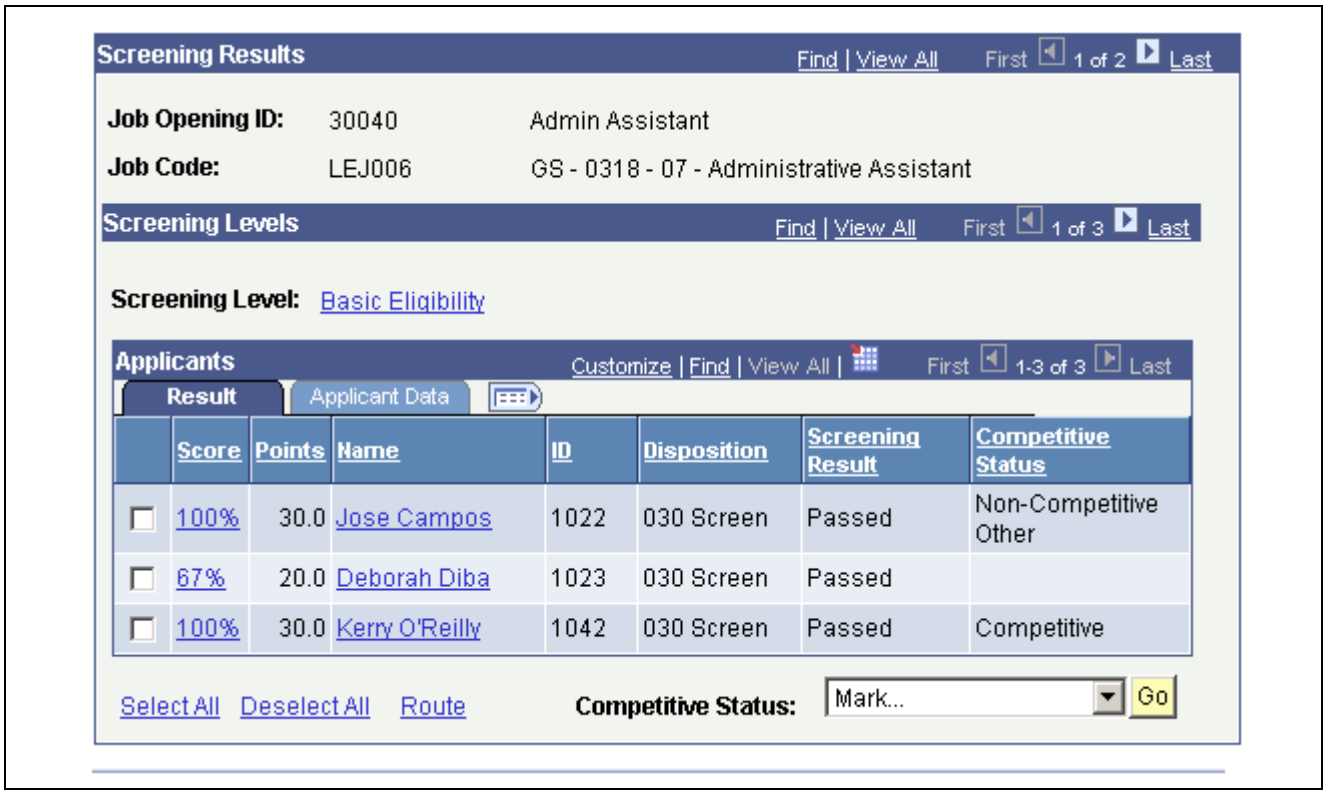
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Reviewing Screening Results

Access the Screening Results page.



Screening Results page (1 of 2)



Screening Results page (2 of 2)

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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.

Apply Click to apply the most resent screening results for an applicant and apply the screening result disposition to the applicant's job opening disposition.

If there are multiple jobcodes associated with the job opening, the process goes through all the screening results and takes the best jobcode disposition found and applies that status to the job opening disposition.

Screening Levels

Screening Level Click the screening level name link to access the Screening Levels - Screening Criteria page.

Applicants - Results Tab

Displays the screening results for each applicant linked to the job opening.

Score Displays the percent the applicant has achieved as a result of running the screening levels.

Click the score percentage link to access the Screening Details page.

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.

Screening Result Displays whether the applicant has passed or failed the screening levels.

If Manually Assign Status is selected on the Screening Criteria page, then you can select the status *Pass* or *Fail*.

(USF) Competitive Status Displays the assigned competitive status.

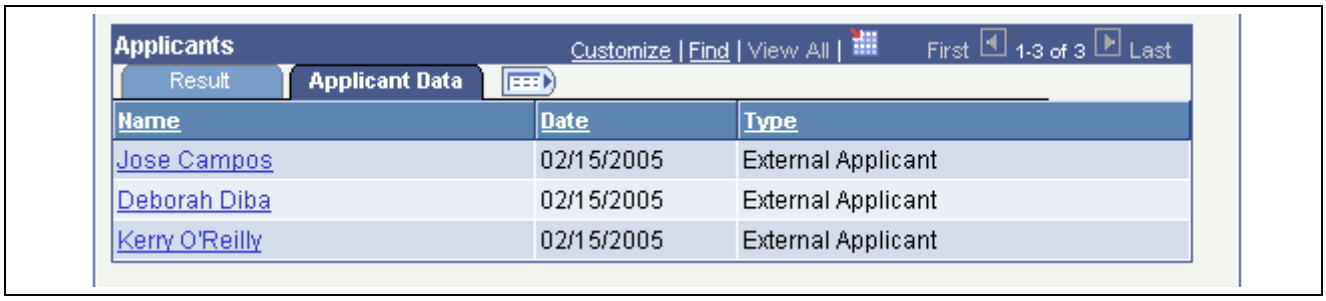
Route Displays the Route Applicants - Route Applicants page.

See Chapter 8, "Screening and Routing Applicants," Routing Applicants, page 214.

Applicants - Applicant Data Tab

Access the Applicant Data tab.

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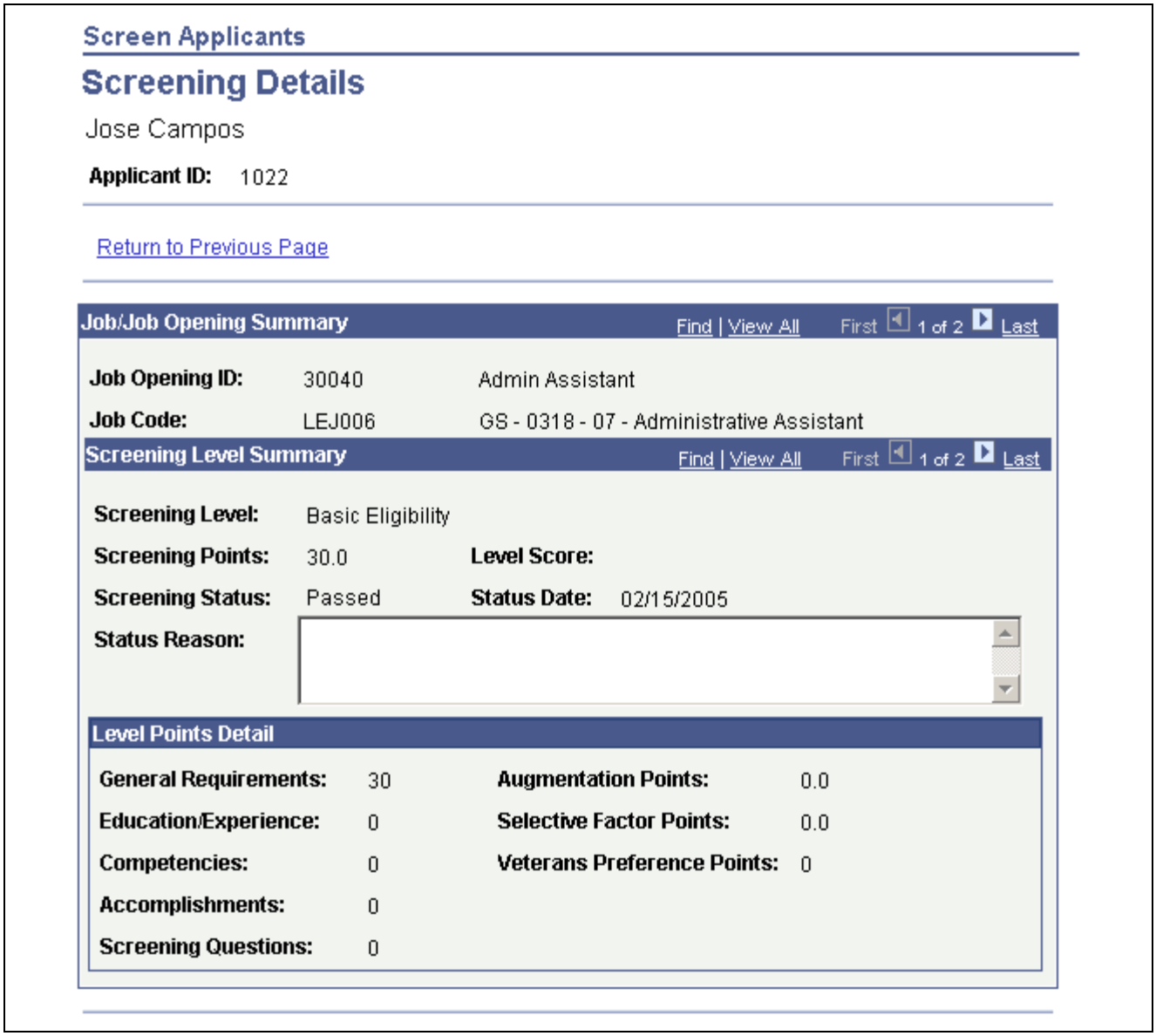


Screening Results page: Applicant Data tab

This grid displays the applicants screened for this job opening and the date the screening level was run.

Reviewing Score Details

Access the Screening Details page.



Screening Details page

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This page provides the details behind the applicant's screening results and score. If the applicant has failed the screening level, an explanation displays in the Status Reason field.

Note. Augmentation Points, Selective Factor Points, Veterans Preference Points, and Priority Placement Points display only for Federal users.

Click the View Questionnaire Results link to access the applicant's answers to the questionnaire that they completed. Only applicants that applied online will have questionnaire results.

Applying Results

Once you have reviewed the screening results and are satisfied with the result, you can apply the results. When you apply the results, the system takes the most recent screening result for an applicant and applies the screen result disposition to the applicants job opening disposition. The screening disposition is determined by the screening level setup. If the applicant passes the level, the disposition is set to the disposition specified on the Pass or Fail Disposition fields on the Screening Setup page.

If there are multiple jobcodes associated with the job opening, the process goes through all of the screening results for all the jobcodes and applies the best disposition it finds.

Note. Only applicants that have been screened can have results applied.

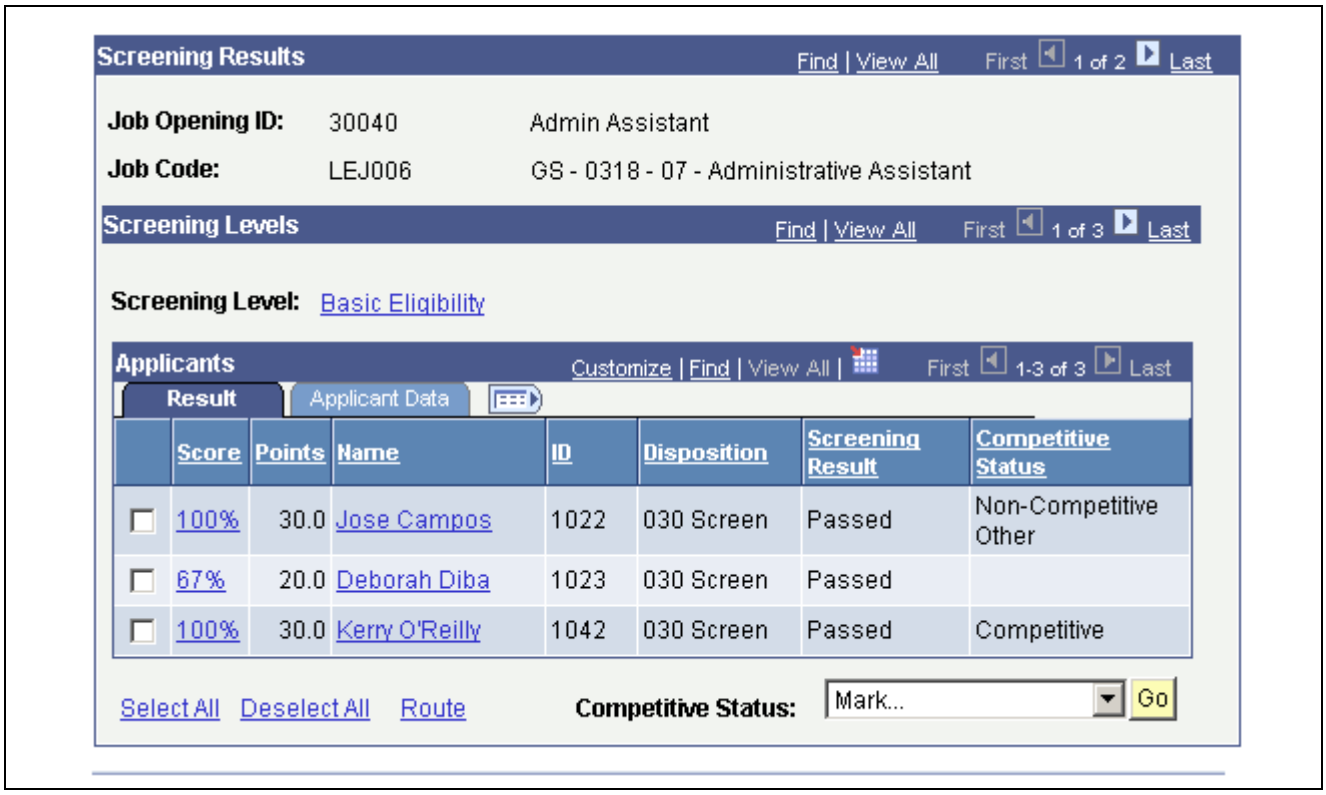
(USF) Assigning Competitive and Noncompetitive Statuses

Access the Job Opening - Screening Results: View Screening Results page.



Screening Results page (1 of 2)

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Screening Results page (2 of 2)

To assign competitive or noncompetitive statuses:

1. Select *Competitive* or *NonCompetitive* in the Competitive Status field.
2. Click the check box next to applicant's score.
3. Click the Go button next to the Competitive Status field.

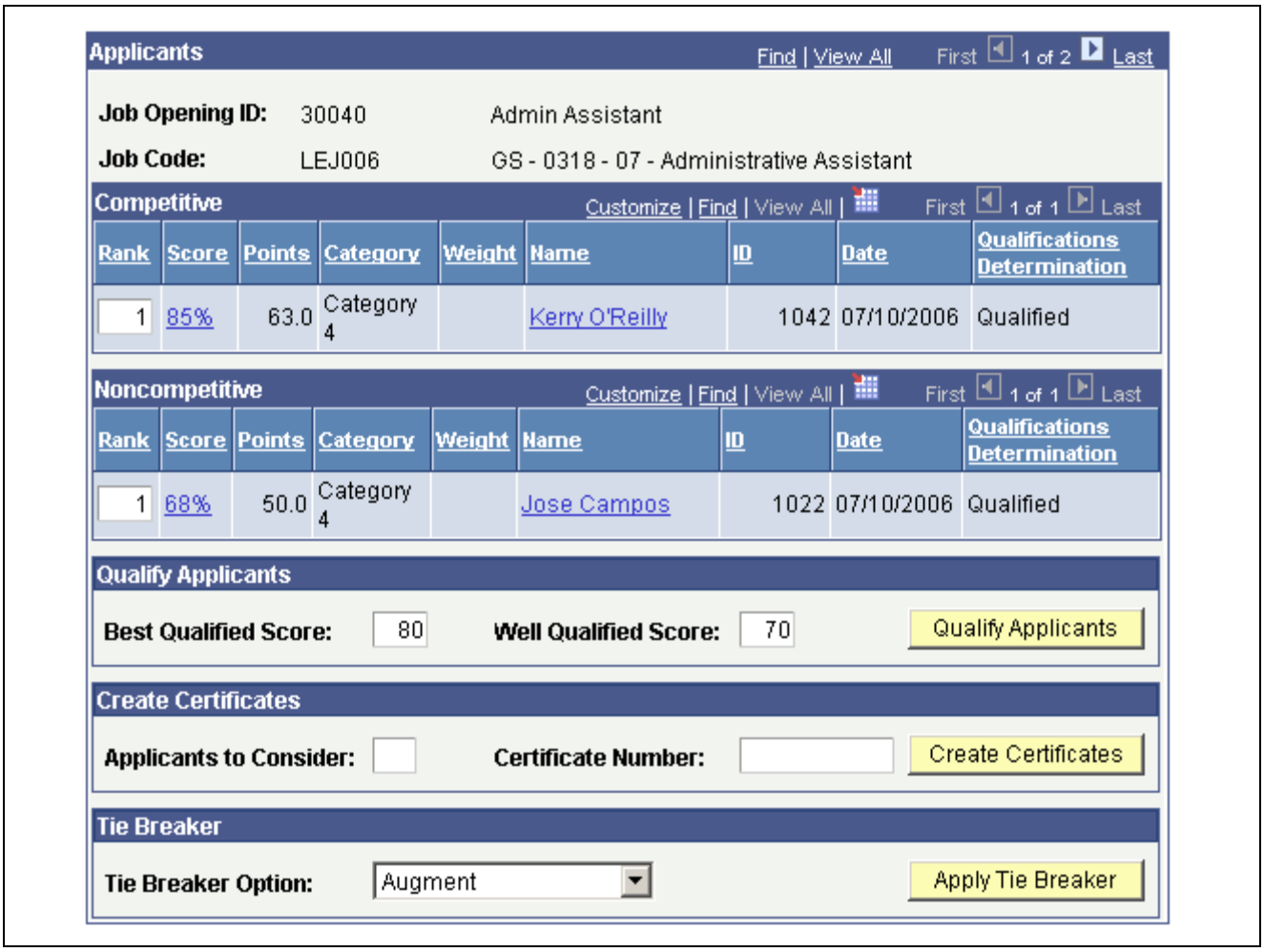
(USF) Ranking Applicants

Access the Rank Applicants page.



Rank Applicants page (1 of 2)

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Rank Applicants page (2 of 2)

Competitive

This grid displays that were identified as competitive during the assigning competitive status step.. 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 assigns 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

This grid displays that were identified as competitive during the assigning noncompetitive status step. When entering the page for the first time, the applicants will have a Qualifications score of Eligible/Not Rated.

The fields in this grid are the same as those in the Competitive group box.

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Qualify Applicants

Use this group box to define best qualified and well qualified scores, then apply to the ompetitive and noncompetitive candidates. Follow these steps to qualify applicants:

1. Define the natural breaks in the rating scores and enter those numbers in the Best Qualified Score and Well Qualified Score fields. These numbers should be the minimum score that is considered to fall into each category.
2. Click the Qualify button.

   The system will rank each applicant listed in the Competitive and Non-Competitive grids according the defined parameters.

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.

(USF) Processing Certificate of Eligibles

Access the Rank Applicants page.

See Ranking Applicants

Routing Applicants

This section discusses how to route applicants.

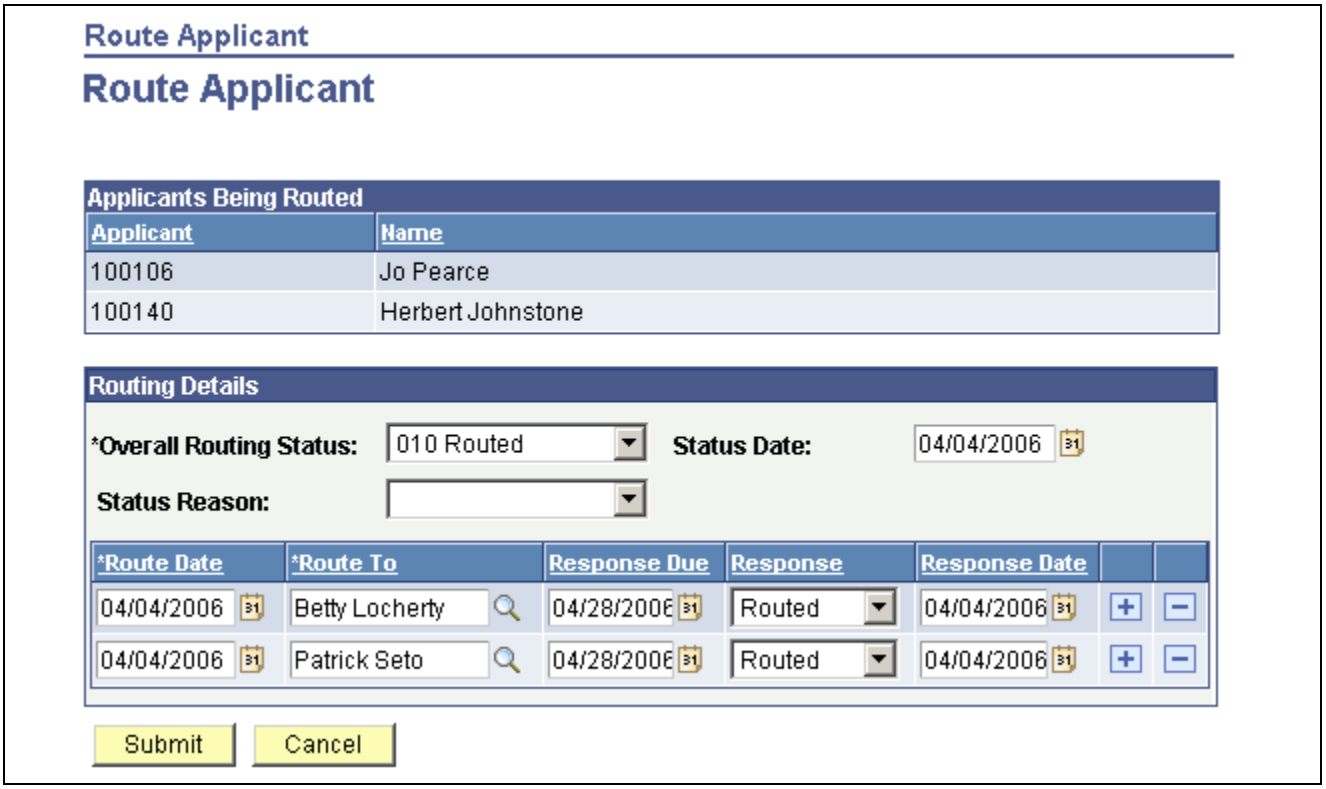
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Pages Used to Route Applicants

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 page

Routing Details

Overall Routing Status Select a routing status. Options are:

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- *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 they entered their response.

Submit Send a notification (HRS_APP_RTE) to the person identified in the Route To field.

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CHAPTER 9

Interviewing Applicants

This chapter describes how to:

- Schedule interviews.
- Complete interview evaluations.
- Send interview evaluation reminders.
- Make final recommendations.
- Review interview schedules.

Scheduling Interviews

This section provides an overview of applicant interviews and discusses how to schedule applicant interviews.

Understanding Applicant Interviews

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 the check box next to one or more applicants applicant in the Applicants grid and then selecting *Manage Interviews* from the Group Action field. The Interview Schedule page displays the applicants you selected.
- The Job Opening page, by selecting the Interview Schedule link. The Interview Schedule page displays all applicants linked to the job opening.
- The Find Applicants page, by selecting the check box next to one or more applicants in the Search Results grid and then selecting *Manage Interviews* from the Group Action field. The Interview Schedule page displays the selected applicants.
- The Manage Applicant page, by selecting *Manage Interview* from the Take Action field in the Applicant group box. The Interview Schedule page displays that applicant.

If the applicant is linked to a job opening, you see information about 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.

You can identify the interview letter you want sent to the applicant. However, the letter cannot be printed until the interview appointment has been saved. You have three options of printing letters:

- Generate Letter, Generate Letter displays a copy of the letter that can be edited and printed immediately. The system automatically populates the Date Printed field with the system date. The letter is removed from the Generate Recruitment Letters (HRSLETTER) process. The system generates a contact note that displays on the Manage Applicant - Contact Notes page.

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- Email Applicant, Email Applicant is available after you have generated the letter. The system displays the Send Correspondence page where you can add the generated letter as an attachment. The system generates a contact note that displays on the Manage Applicant - Contact Notes page.
- Upload Letter, Upload Letter is available after you have generated a letter and the letter template is not locked in the report definition. It allows users to upload an interview letter that has been saved to disk. The system generates a contact note that displays on the Manage Applicant - Contact Notes page.

If you do not choose one of the above options, the letter can be printed using the Generate Recruitment Letters component.

Note. Talent Acquisition Manager uses Oracle XML Publisher to generate recruitment letters.

See Also

Enterprise PeopleTools 8.48 PeopleBook: XML Publisher for PeopleSoft Enterprise

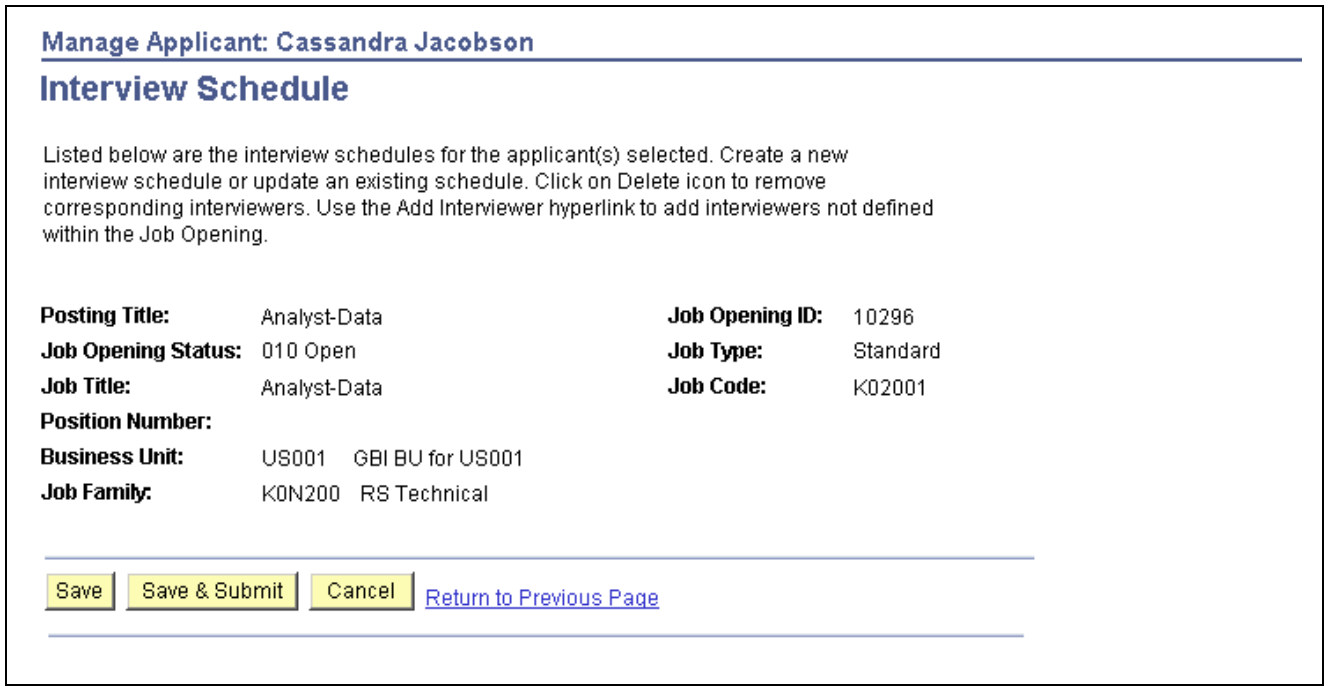
Pages Used to Schedule Applicant Interviews

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.

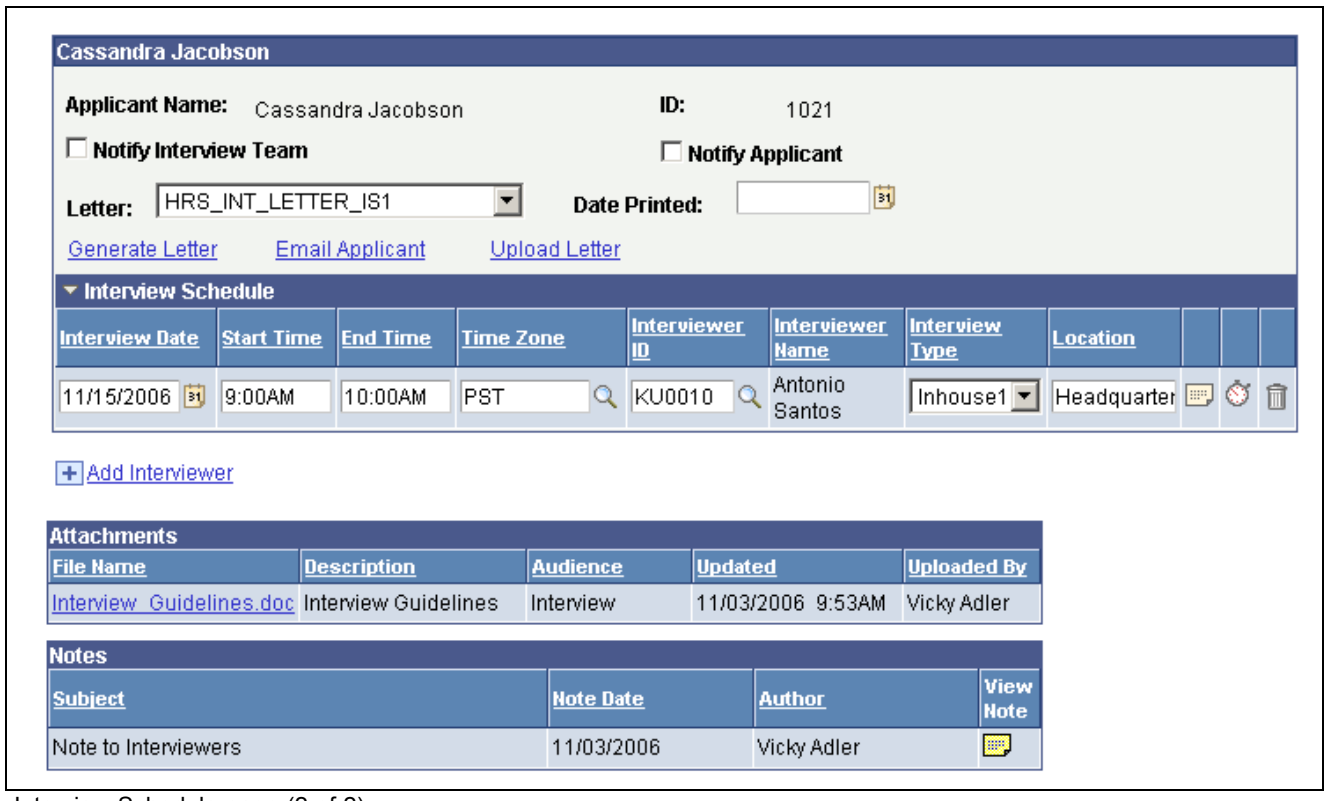
Scheduling Applicant Interviews

Access the Interview Schedule page.

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Interview Schedule page (1 of 2)



Interview Schedule page (2 of 2)

Save Click to save the data, but not update the disposition.

Save & Submit Click when you have finished entering the information for scheduling interviews. The system updates the applicant's disposition to *Interview*.

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<Applicant Name>

Notify Interview Team Select this check box to have an email notification sent to the interviewers listed in the Interview Schedule grid.

If the applicant is linked to job opening, the system sends the notification HRS_INTVW_SCHED_TEAM.

If the applicant is not linked to job opening, the system sends the notification HRS_INTVW_SCHED_TEAM_NOJO.

Notify Applicant Select this check box to have an email notification sent to the applicant.

If the applicant is linked to job opening, the system sends the notification HRS_INTVWSCHED_APPL.

If the applicant is not linked to job opening, the system sends the notitication HRS_INTVWSCHED_APPL_NOJO.

Letter This link is available after you have entered and saved an interview appointment.

Select the letter you want to send to the applicant when an interview is scheduled. Talent Acquisition delivers the following templates:

- *HRS_INT_LETTER_IS1*
- *HRS_INT_LETTER_IS2*
- *HRS_INT_LETTER_IS3*

Generate Letter Click this link to print the letter immediately.

The system displays the letter and you can make any necessary modifications. Once the letter is printed, the Generate Letter link is no longer available and the letter is removed from the Generate Recruitment Letters (HRSLETTR) process. The system creates a contact note entry on the Manage Applicant - Contact Notes page.

Email Applicant Click this link to display the Send Correspondence page, which enables you to send the interview letter as an attachment to the email. The system creates a contact note entry on the Manage Applicant - Contact Notes page.

Upload Letter Click this link to open a browser window and upload a saved interview letter. The system creates a contact note entry on the Manage Applicant - Contact Notes page.

Interview Schedule

Interview Date Enter the date on which the interview is to take place.

Start Time Enter the time the interview is scheduled to begin.

End Time Enter the time the interview is scheduled to end.

Time Zone Enter the time zone in which the interview is to occur.

Interviewer ID Select an interviewer. The system automatically displays the members of the interview team that are associated with the job opening.

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Interview Type Select the type of interview. Define interview types on the Interview Types page.

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.

 Click this icon to delete the schedule interview.

If the Notifiy Interview Team or Notify Applicant check boxes are selected, the system sends a notification to interviewers listed in the Interview Schedule grid or to the applicant notifying them of the cancelled interview.

The interviewers receive:

- HRS_INTVWSCHED_TEAM_CANCEL if there is a job opening linked to the applicant.
- HRS_INTVWSCHED_TEAM_NOJO_CANCEL if there is no job opening linked to the applicant.

The applicant receives:

- HRS_INTVWSCHED_APPL_CANCEL if there is a job opening linked to the applicant.
- HRS_INTVWSCHED_APPL_NOJO_CANCEL if there is no job opening linked to the applicant.

Add Interviewer Click this link to add another row to the Interview Schedule grid.

Attachments

This group box displays a list of job opening related attachments. Job opening attachments are added using the Job Opening page: Activities and Attachments tab.

Notes

This group box displays a list of job opening related notes with an audience equal to *Interview*. Job opening notes are added using the Job Opening page: Activities and Attachments tab.

Rescheduling Interviews

Access the Interview Schedule page

See Scheduling Interviews

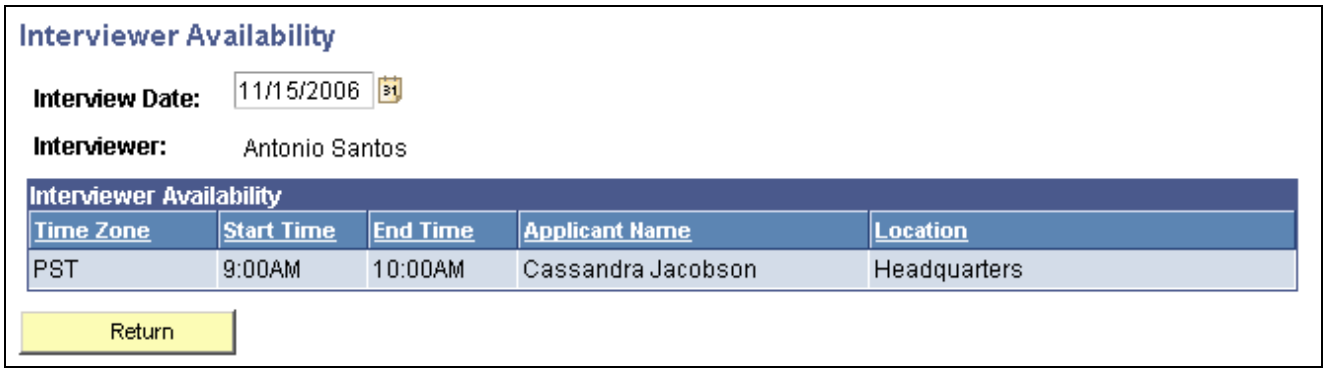
To reschedule an interview:

1. Delete the old interview appointment.
2. Add the new interview appointment.

Checking Interviewer Availability

Access the Interviewer Availability page.

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Interviewer Availability page

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 57.

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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.

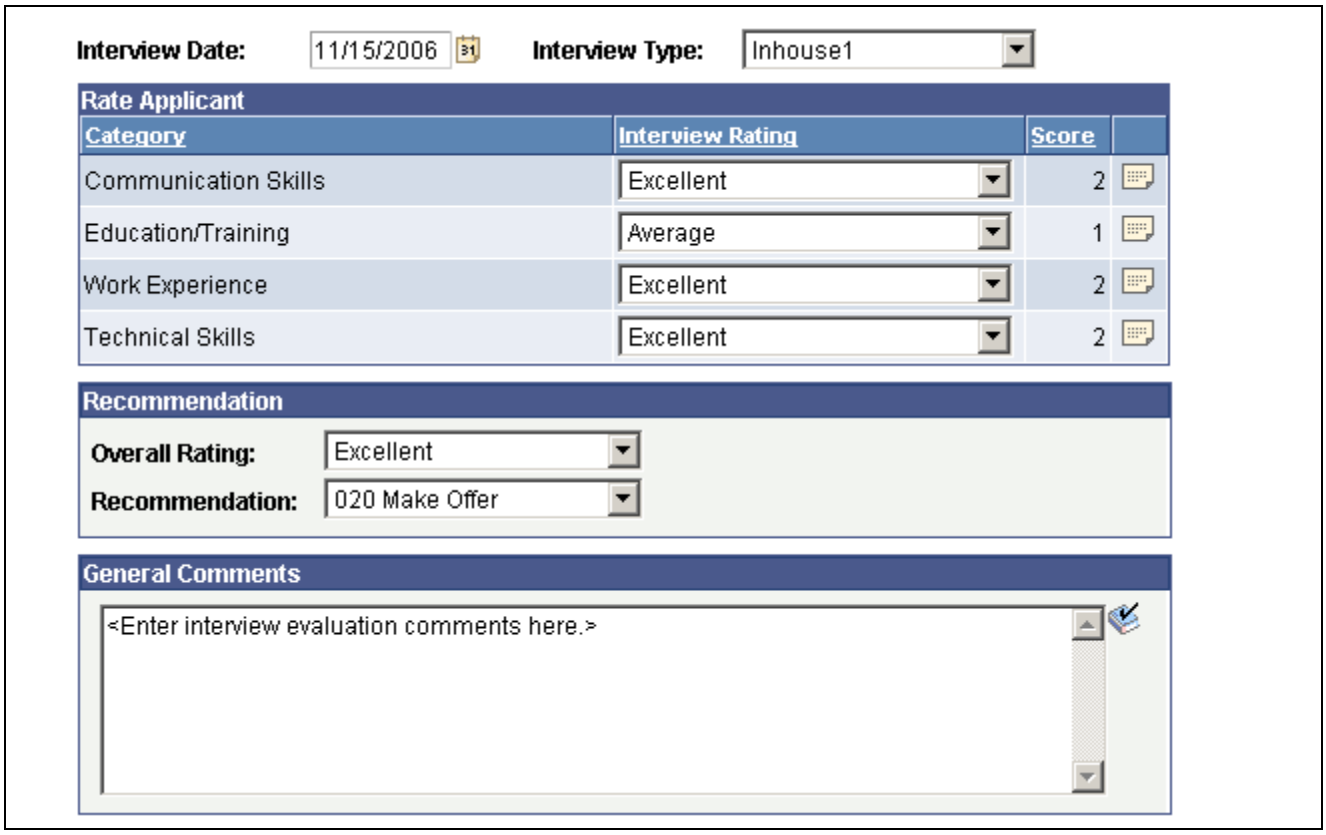
Completing an Interview Evaluation

Access the Interview Details - Interview Evaluation page.



Interview Evaluation page (1 of 2)

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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.

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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 can run the process at user-defined intervals.

See Also

Enterprise PeopleTools 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 which letter you want sent to the applicant telling them of your recommendation. However, you must save the entered data and then return to the Disposition Details - Interview page to print the letter immediately or send it using email. Otherwise, the letter can be printed using the Generate Recruitment Letters component.

Prerequisite

Before you make a final recommendation, you must have interview evaluations forms completed.

See Chapter 9, “Interviewing Applicants,” Completing Interview Evaluations, page 222.

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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.

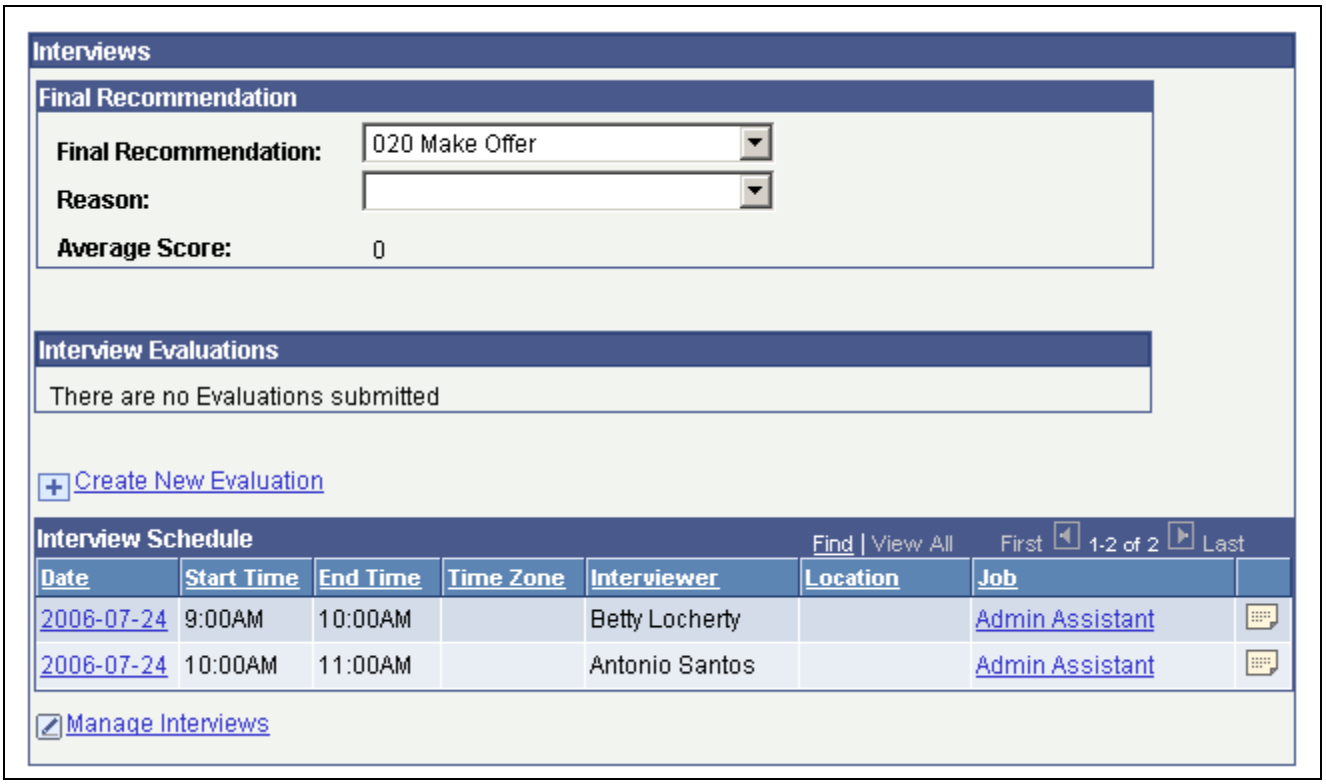
Making Final Recommendations

Access the Manage Applicant - Disposition Details: Interview page.

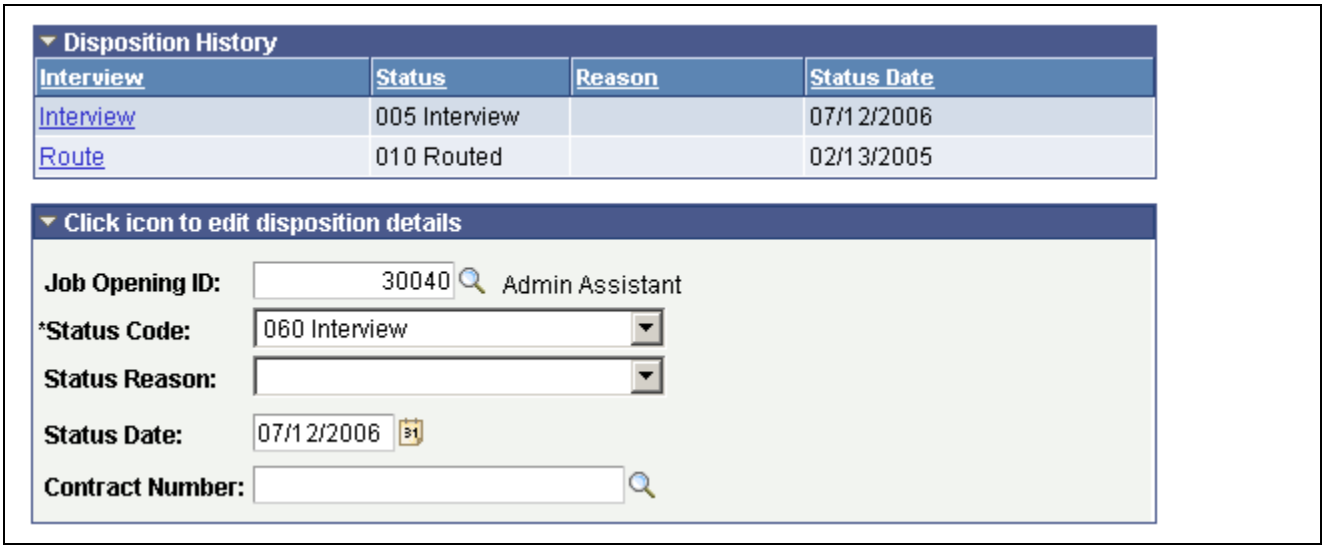


Disposition Details: Interview page (1 of 3)

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Disposition Details: Interview page (2 of 3)



Disposition Details: Interview page (3 of 3)

Final Recommendation

Final Recommendation Select a final recommendation.

Reason Select a reason for the final recommendation.

Interview Evaluations

This group box displays a list of the completed interview evaluations.

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Interview Schedule

This group box displays the applicant's scheduled interviews.

Disposition History

This group box displays the applicant's disposition history.

Click icon to edit disposition details

Use this group box to edit the applicant's disposition status.

Reviewing Interview Schedules and Evaluations

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

- Review applicant interview schedules and evaluations..
- Review interview calendars.

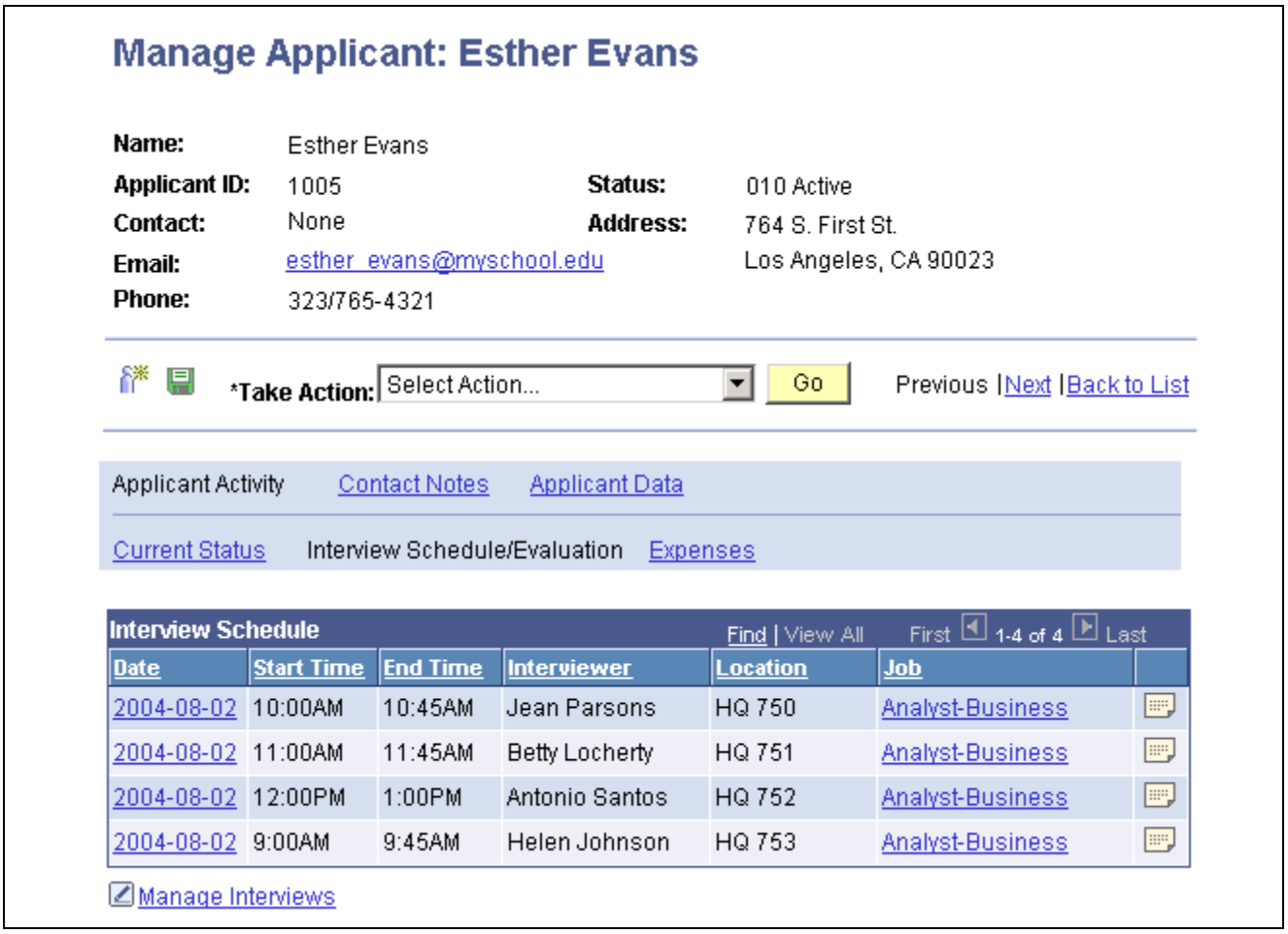
Pages Used to Review Interview Schedules and Evaluations

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.

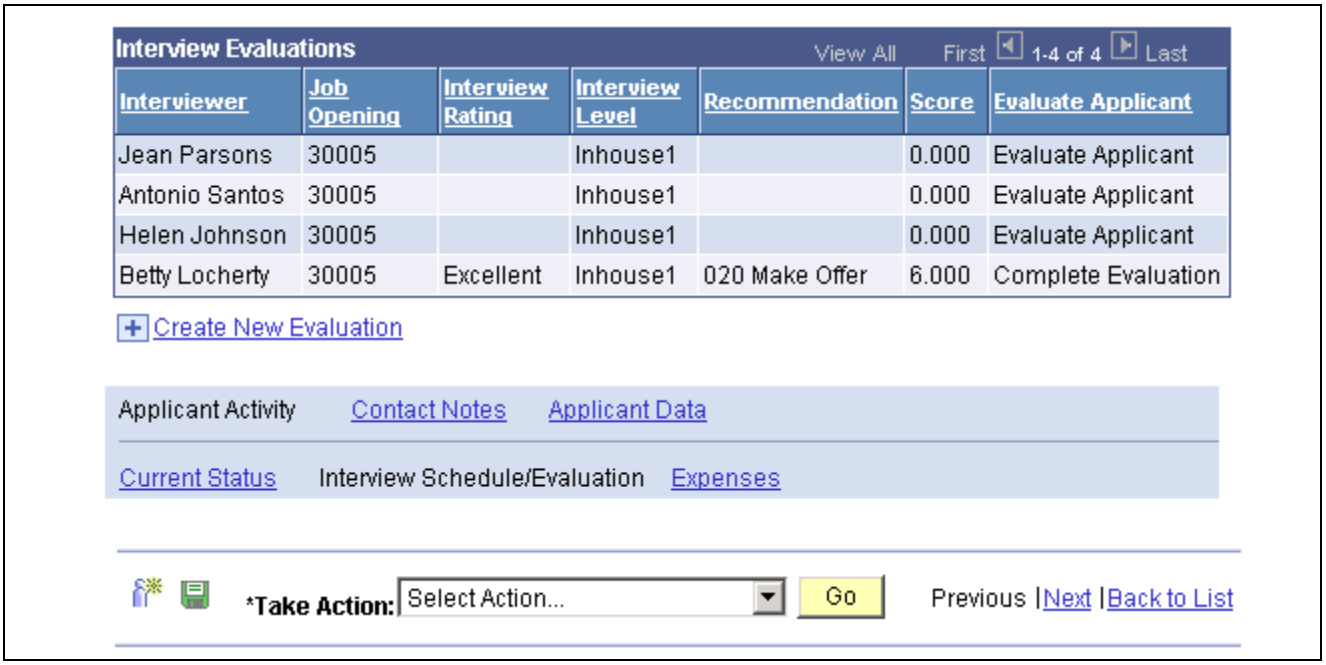
Reviewing Applicant Interview Schedules and Evaluations

Access the Manage Applicant - Applicant Activity - Interview Schedule/Evaluation page.

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Manage Applicant - Applicant Activity: Interview Schedule/Evaluation page (1 of 2)



Manage Applicant - Applicant Activity: Interview Schedule/Evaluation page (2 of 2)

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Interview Schedule

Date Click this link to display the Interview Schedule page where you can edit this interview appointment.

See Interviewing Applicants, Scheduling Interviews

Job Click this link to display the Job Opening page.

See Creating Job Openings

Manage Interviews Click this link to display the Select a Job Opening page, (HRS_APP_ACTION) which begins the process for adding a new interview appointment for a selected job opening.

See Interviewing Applicants, Scheduling Interviews

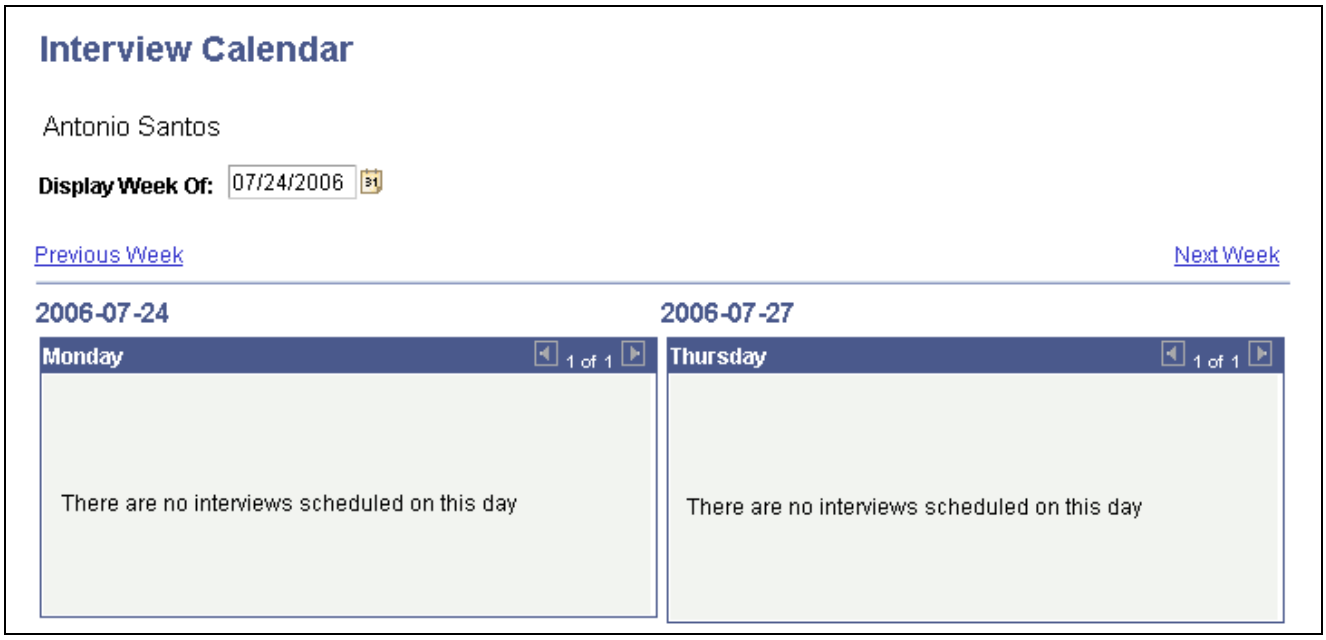
Interview Evaluations

This group box displays the list of interviewers that are to complete an interview evaluation.

Create New Evaluation Click this link to display the Select Job Opening for Evaluation page, (HRS_APP_ACTION) which begins the process for completing an interview evaluation for a selected job opening.

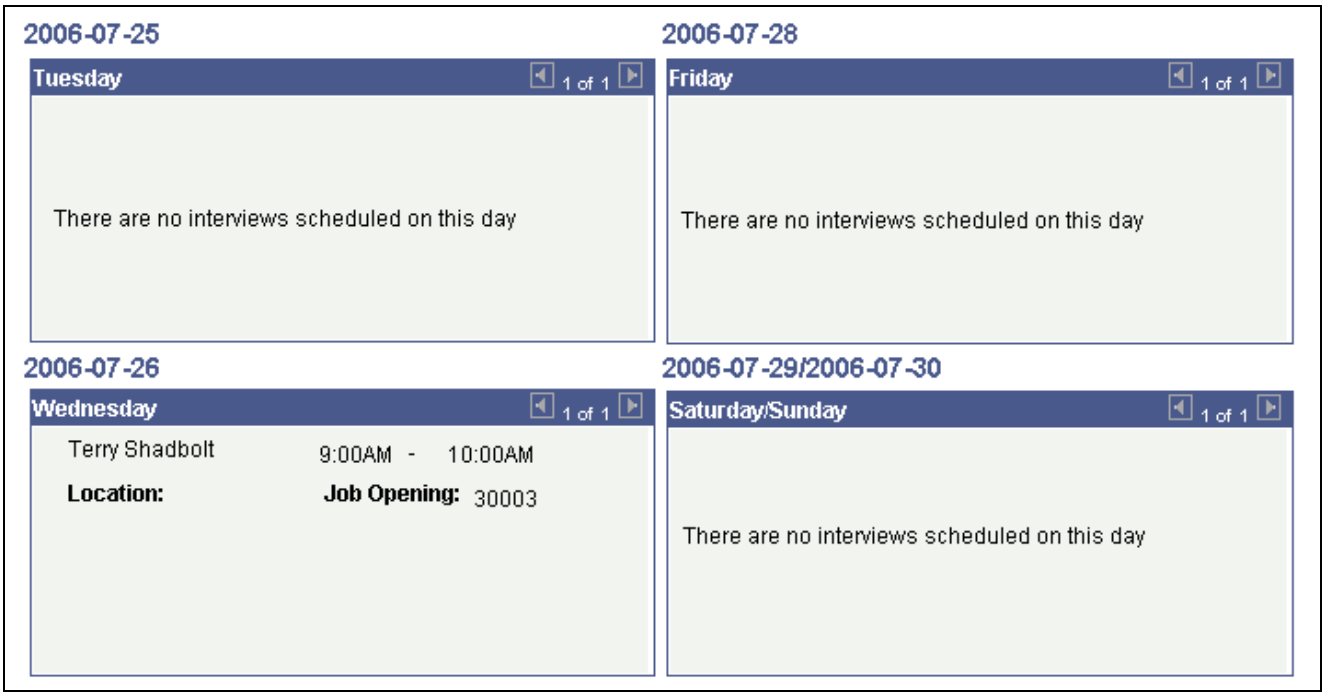
Reviewing Interview Calendars

Access the Interview Calendar page.



Interview Calendar page (1 of 2)

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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.

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CHAPTER 10

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. If approvals is active, the status is set to *Pending Approval*. If approvals is not active, the status is set to *Extend*.

You can identify an offer letter you want sent to the applicant. However, the letter cannot be printed until the offer status is set to *Extend*. You have three options of printing letters:

- Generate Letter, Generate Letter displays a copy of the letter that can be edited and printed immediately. The system automatically populates the Date Printed field with the system date. The letter is removed from the Generate Recruitment Letters (HRSLETTER) process. The system generates a contact note that displays on the Manage Applicant - Contact Notes page.
- Email Applicant, Email Applicant is available after you have generated the letter. The system displays the Send Correspondence page where you can add the generated letter as an attachment. The system generates a contact note that displays on the Manage Applicant - Contact Notes page.
- Upload Letter, Upload Letter is available after you have generated a letter and the letter template is not locked in the report definition. It allows users to upload oOffer letter that has been saved to disk. The system creates a contact note entry on the Manage Applicant - Contact Notes page..

If you do not choose one of the above options, the letter can be printed using the Generate Recruitment Letters component.

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Next, you enter the components that make up the job offer and any comments you want attached to the job offer.

If you must 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*.

Note. Once you click Save for Later or Submit, the page title changes to Disposition Details.

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 Recruiting Processes," Setting Up Job Offers, page 38.

See Chapter 2, "Setting Up Recruiting Processes," Setting Up Talent Acquisition Manager Implementation Defaults, page 7.

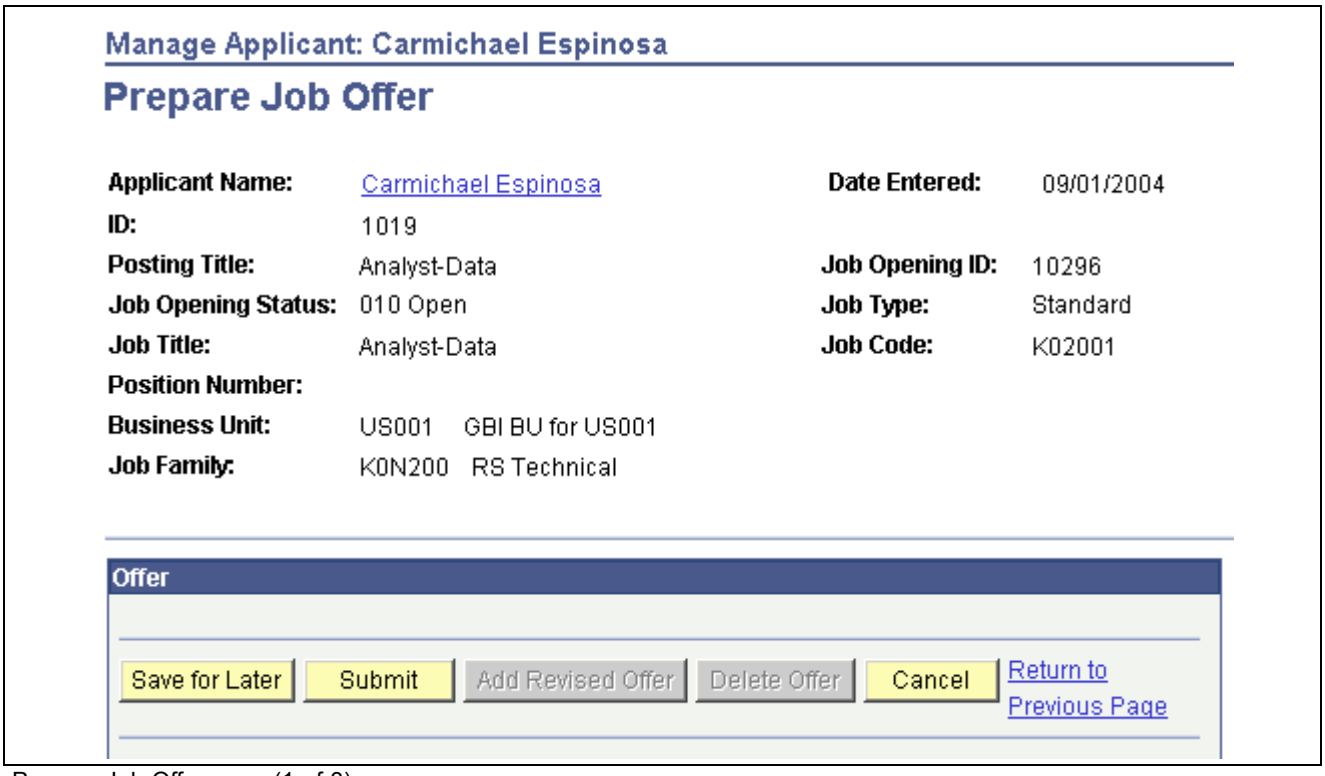
Pages Used to Prepare Job Offers

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.

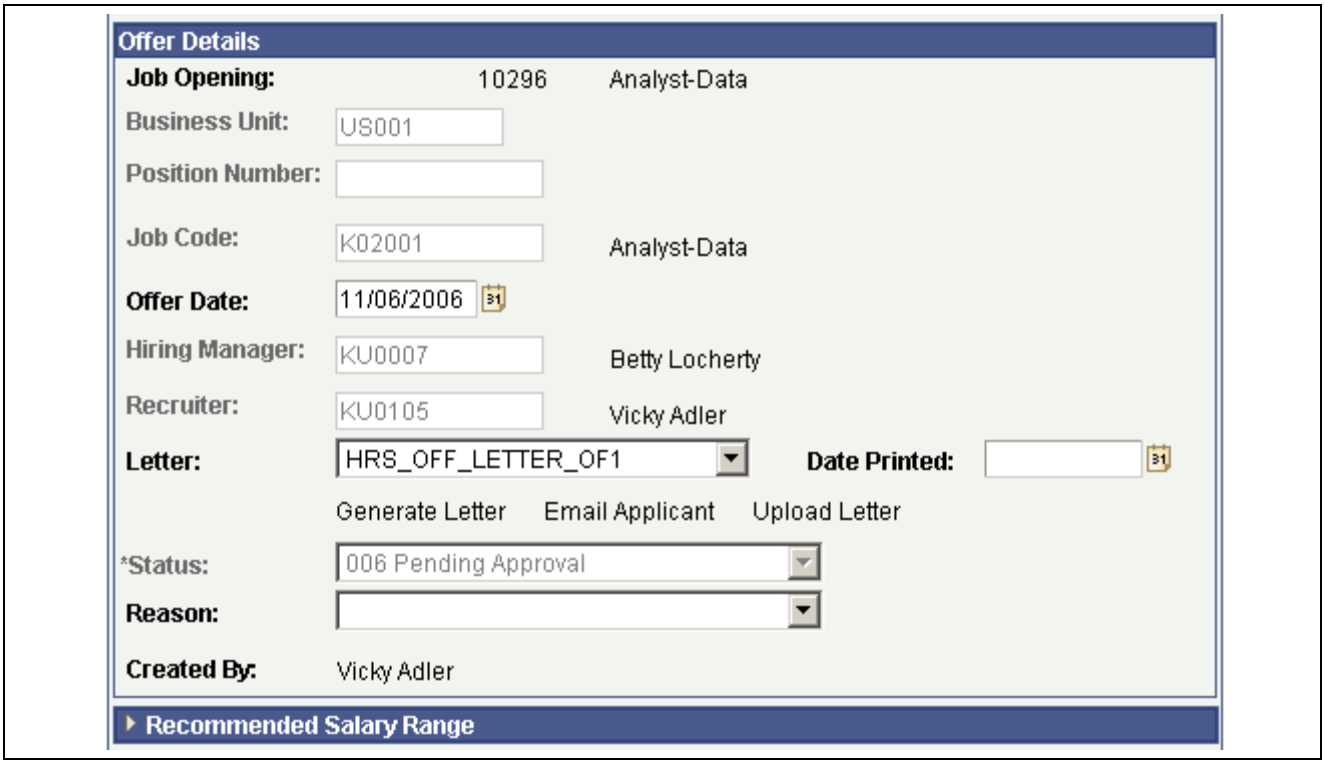
Creating a Job Offer

Access the Manage Applicant - Prepare Job Offer page.

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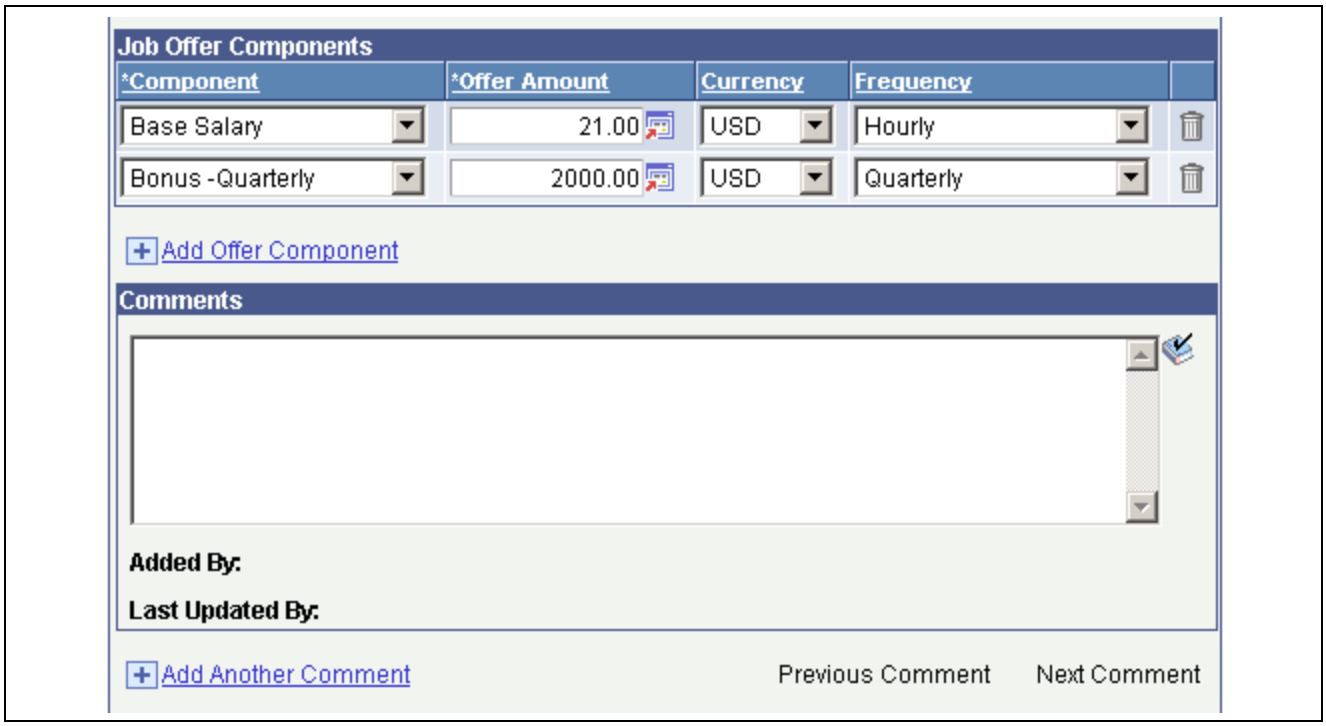


Prepare Job Offer page (1 of 3)



Prepare Job Offer page (2 of 3)

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Prepare Job Offer page (3 of 3)

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 This field appears if the Optional Works Council option is selected on the Recruiting Installation - Installation Options page.

The system automatically displays the works council ID associated with the job opening. If there is no job opening associated with the job offer you can enter one.

Job Code 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. Talent Acquisition Manager delivers the following templates:

- HRS_OFF_LETTER_OF1
- HRS_OFF_LETTER_OF2

Generate Letter This link is available only if the offer status equals *Extend* and a letter has not been generated.

Click this link to print the letter immediately.

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Once the letter is printed, the Generate Letter link is no longer available and the letter is removed from the Generate Recruitment Letters (HRSLETTR) process. The system creates a contact note entry on the Manage Applicant - Contact Notes page.

Email Applicant This link is available only if the letter has been generated.

Click this link to display the Send Correspondence page. You can add the generated letter as an attachment. The system creates a contact note entry on the Manage Applicant - Contact Notes page.

Upload Letter This link is available only if the letter has been generated.

Click this link to upload a saved the letter as an attachment.

Status Enter the job offer status. Valid choices are:

- *Draft*
- *Pending Approval*
- *Denied*
- *Extend*
- *Accept*
- *Acceptance Withdrawn*
- *Hold*
- *Offer Rejected*
- *Offer Withdrawn*

If approvals is active, the value defaults to *Pending Approval*. If approvals is not active, the value defaults to *Extend*.

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.

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Comments

Enter any comments that help explain the reasons behind the job offer details. Offer comments are only visible on the Prepare Job Offer page.

Save for Later Saves 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.

If approvals is active, the page refreshes with a new title Disposition Detail, the approval path, and links for Offer Details and Approvals.

See Chapter 10, "Making Job Offers," Approving Job Offers, page 238.

Add Revised Offer This button is available if the offer has a status of *Rejected*. 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.

Disposition Details

This group box displays offer statuses and generated letters.

Approving Job Offers

This section provides an overview of job offer approvals, lists prerequisites, and discusses how to:

- View pending approvals.
- Approve job offers.
- Add another approver or reviewer.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Working with Approvals"

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.

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.

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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 pushback 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.

   Note. If the supervisor of the primary hiring manager is inactive, the system checks the level up to find the supervisor of the inactive employee.

   See *PeopleSoft Enterprise HRMS 9.0 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 9.0 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.

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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.

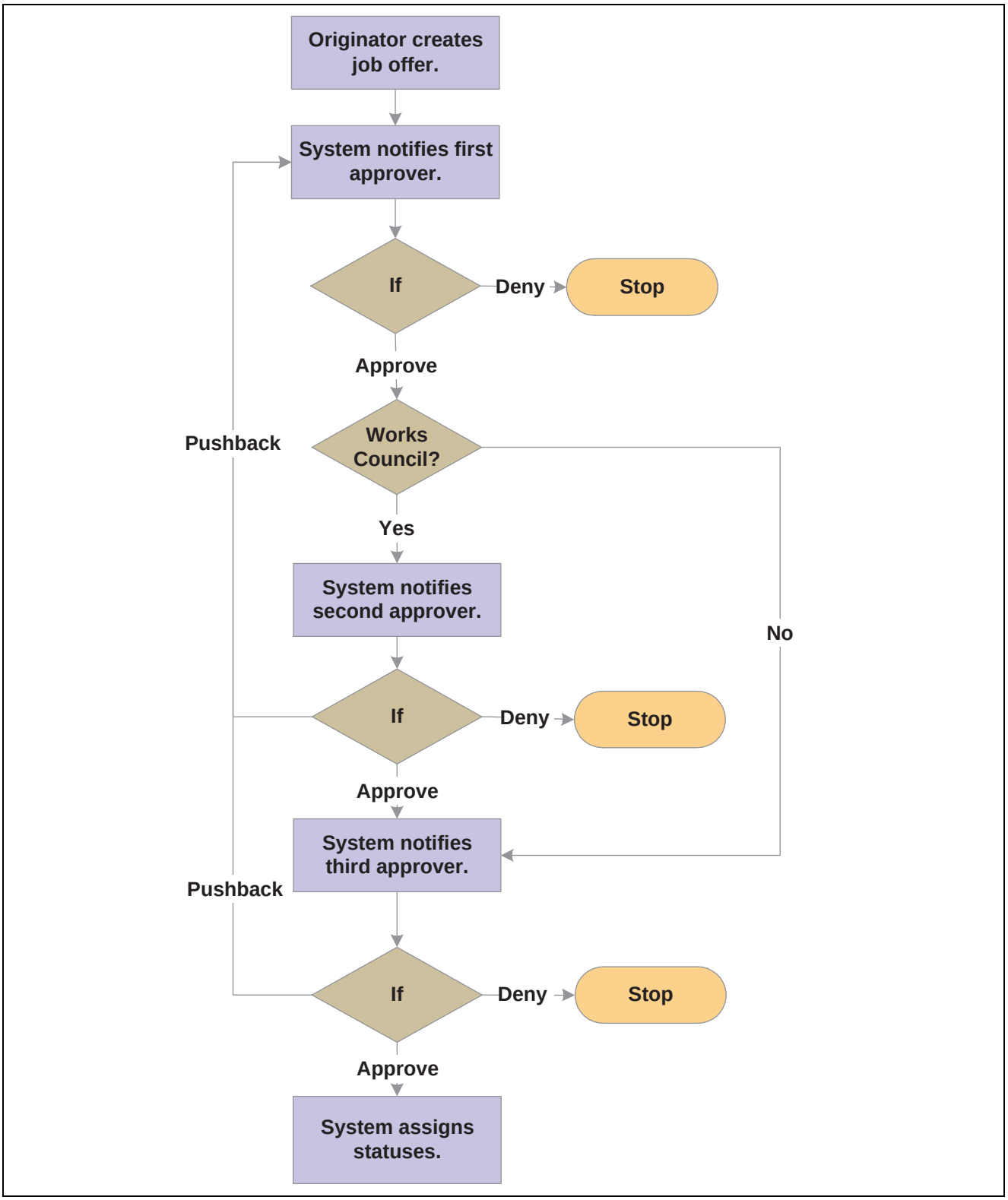
5. If the third approver approves the job offer, the system updates the status of the job offer to Extend and ends the approval process.

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:

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Delivered job offer approval process

Prerequisites

To use the works council step in the job offer approval process, you must:

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1. Set up works council IDs.

   See *PeopleSoft Enterprise Human Resources 9.0 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 Recruiting Processes," Defining Recruiting Installation Defaults, page 7.

3. Add the Works Council Information section to job opening templates.

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

4. Add a works council ID to job opening or job offer.

   See Chapter 6, "Creating Job Openings," Entering Job Opening Details, page 128.

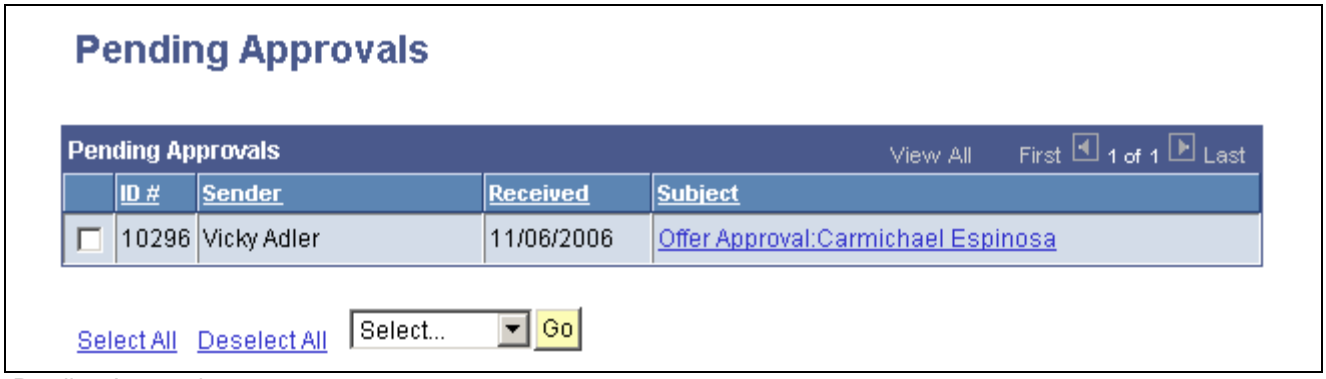
   See Chapter 10, "Making Job Offers," Creating a Job Offer, page 234.

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 and Approving Pending Approvals

Access the Pending Approvals page.



Pending Approvals page

Select the check box next to approval that you wish to approve or deny. Select either *Approve* or *Deny* from the Select box and click Go.

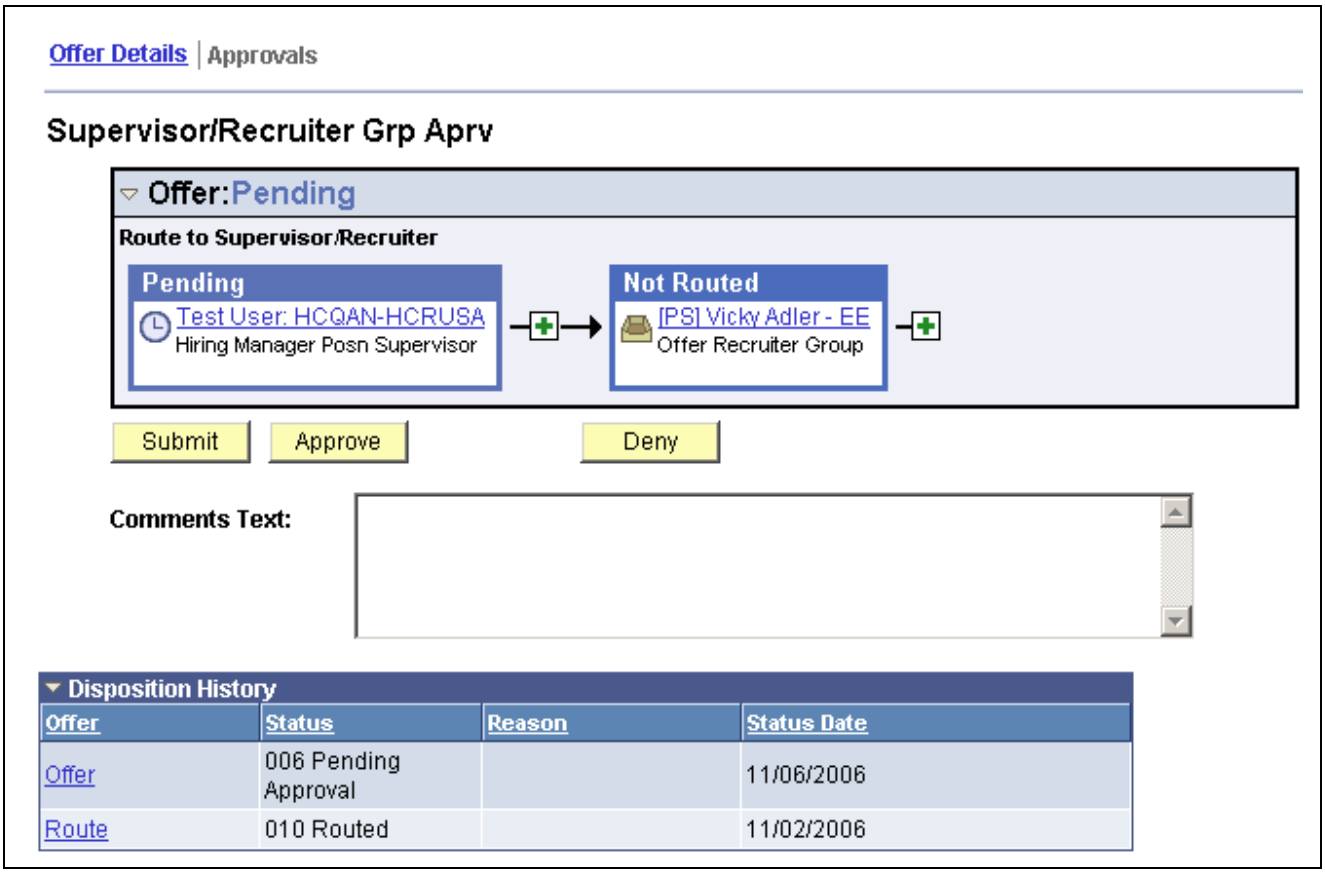
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Approving Job Offers

Access the Manage Applicant - Disposition Details page.



Manage Applicant - Disposition Details page (1 of 2)



Manage Applicant - Disposition Details page (2 of 2)

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	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 save any changes to 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. This is only available to the second approver.
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 6, "Creating Job Openings," Adding Another Approver or Reviewer, page 160.

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.

The information that appears is the same as when you created the job offer. Update any relevant details of the job offer.

See Chapter 10, "Making Job Offers," Creating Job Offers, page 233.

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CHAPTER 11

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 85.

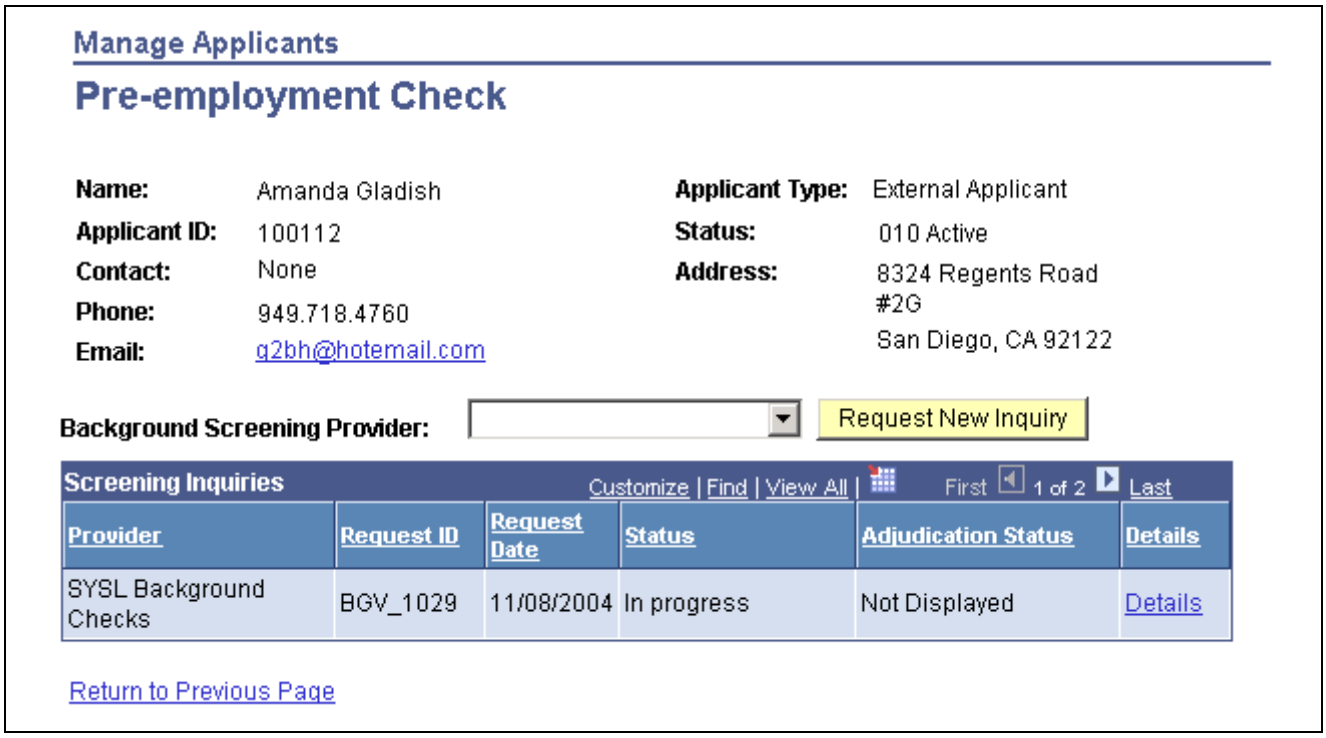
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Pages Used to Complete Pre-Employment Checks

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.

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Screening Inquiries

This group box displays the summary information and status of the background check.

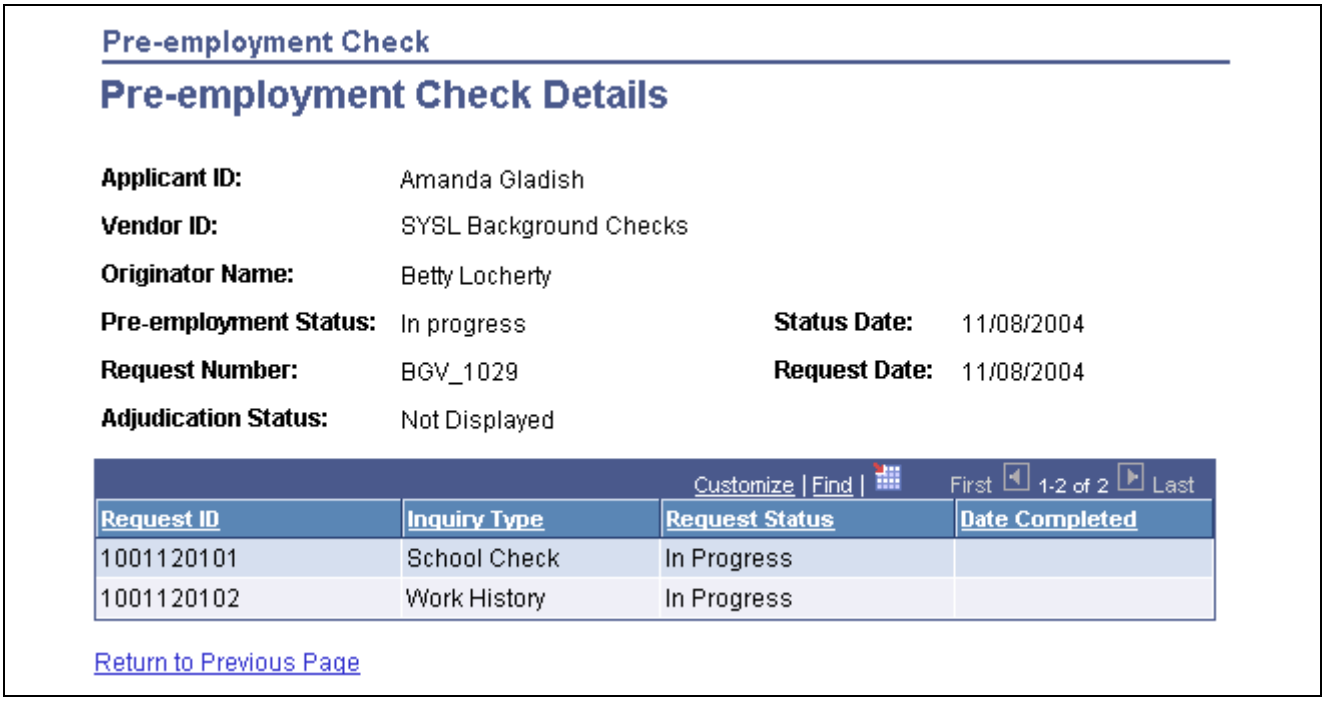
Adjudication Status Displays the status of the adjudication, if you have enabled it on the Open Integration Framework - Pre-Employment Vendor Setup page.

See Chapter 5, "Setting Up Third Party Integrations," Defining Settings for Pre-Employment Vendors, page 90.

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.

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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 9.0 PeopleBook: Administer Workforce*, "Entering Additional Data in Human Resources Records," Tracking Workforce Contracts.

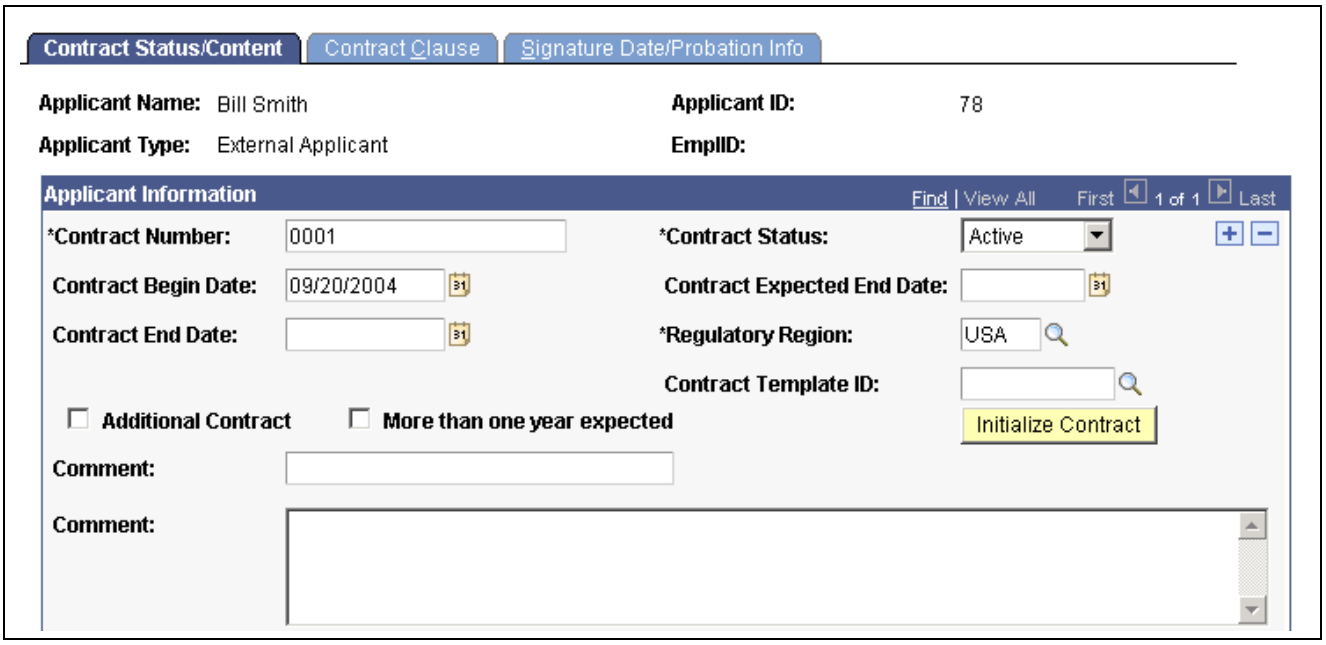
Pages Used to Manage Applicant Contracts

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.

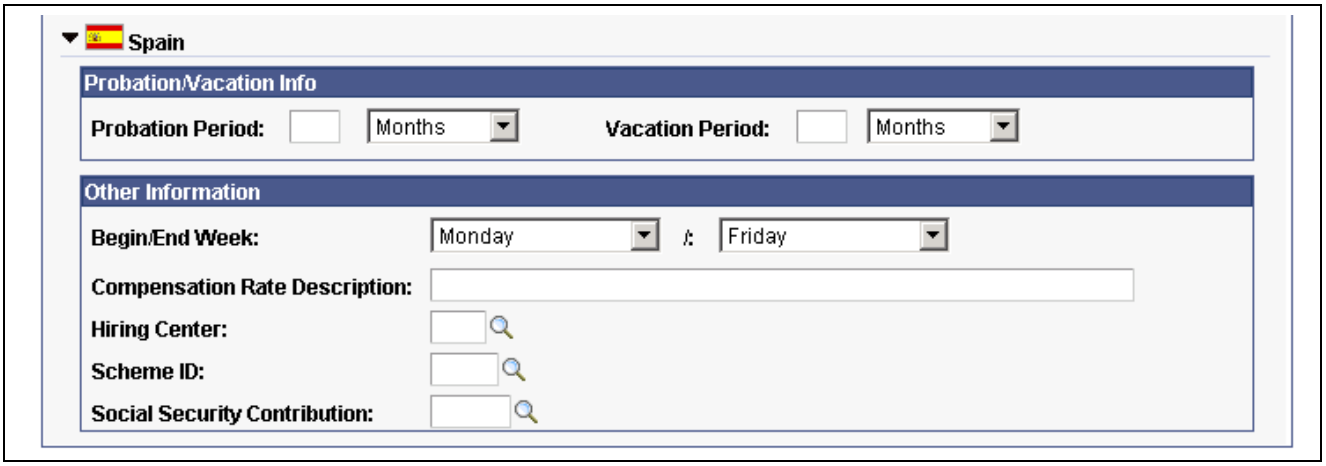
Defining Basic Contract Information

Access the Contract Status/Content page.

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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 this check box if the worker already has at least one contract. Clear this option if this is the workers only contract.

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More than one year expected Select this check box if you expect that this contract will result in more than one year of employment for this worker.

Note. This check box is required for contracts with Japanese workers.

Comment Enter a comment. This comment is used only for informational purposes.

Comment Enter a comment. This comment is used only for informational purposes.

(ESP) Spain

Probation Period If this worker's contract includes a probation period, use these two fields to specify how long it will be. Use the first field to enter the appropriate quantity and the second field to select a unit of time. Units of time are *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.

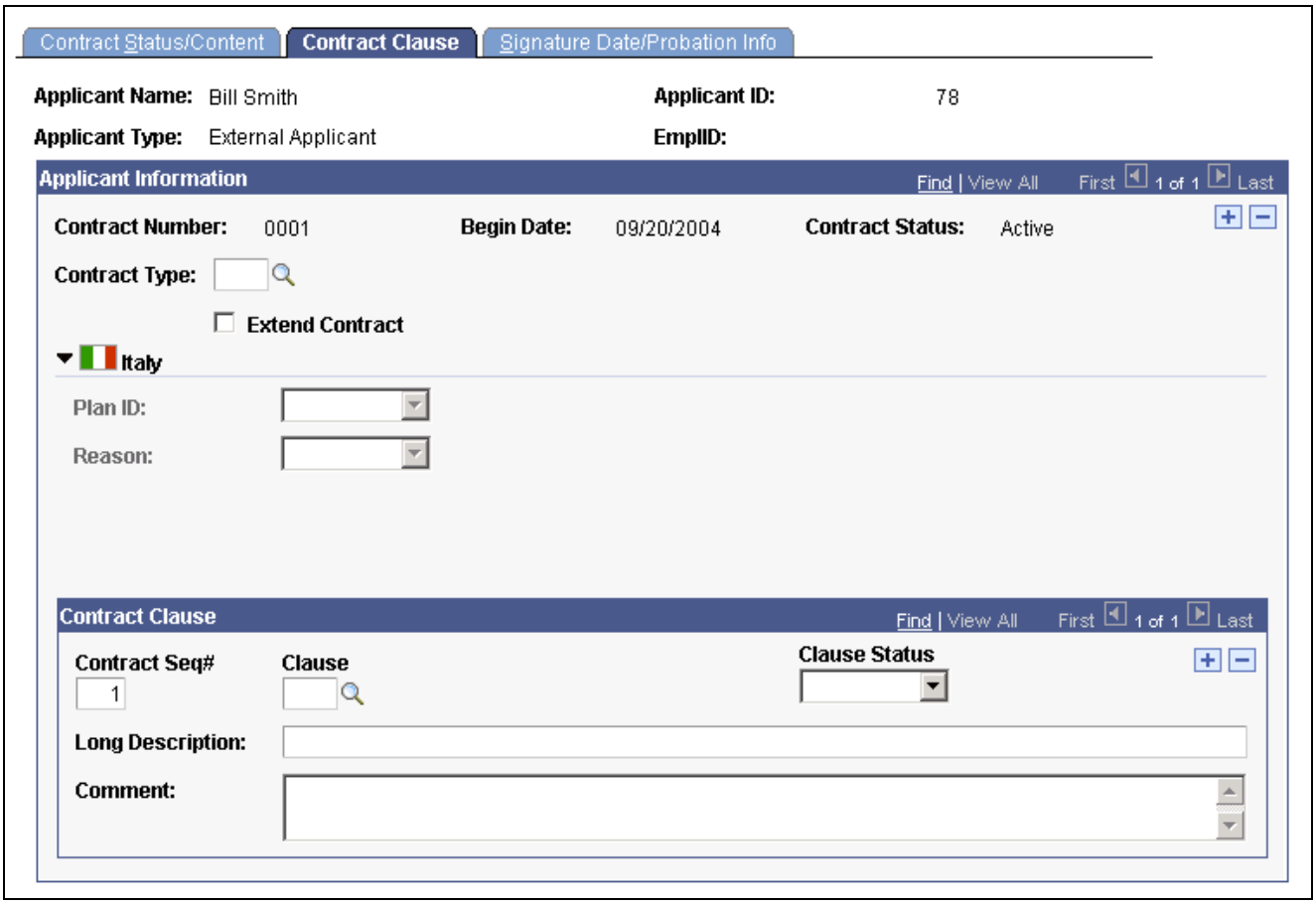
Scheme ID Select a scheme ID.

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.

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Contract Clause page

Application Information

Contract Type This is a required field that identifies the contract type for this template from the contract types that you have set up on the Contract Type Table page.

Extend Contract Select this check box if the contract can be extended.

(ITL) Italy

Plan ID If the worker was assigned a contract type of *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.

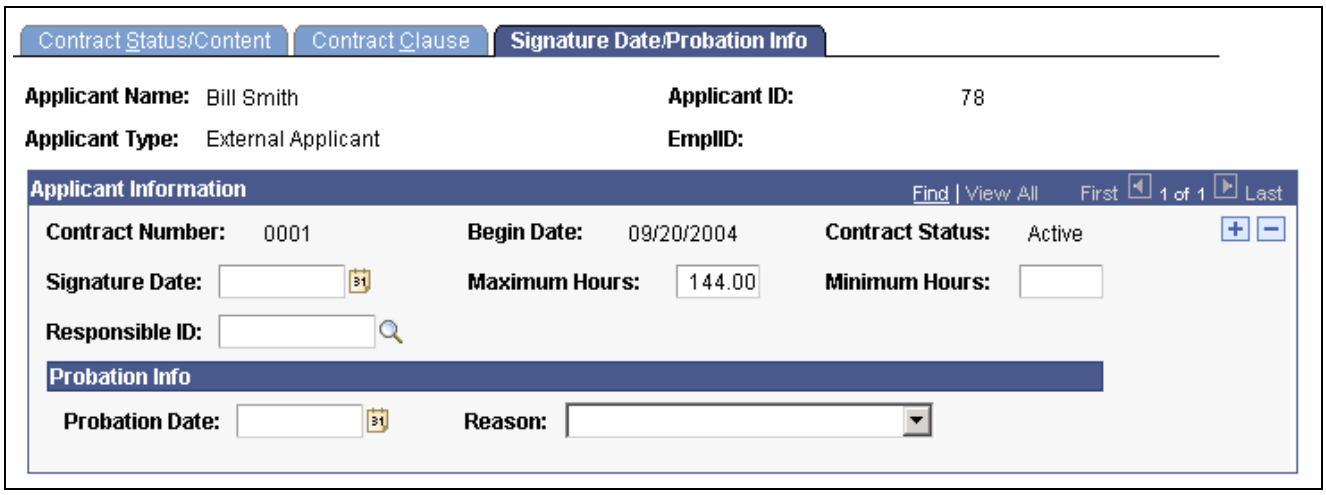
Long Description Enter a description. This description is used only for informational purposes.

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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.

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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 Enterprise Human Resources 9.0 PeopleBook: Administer Salary Packaging.*

See *PeopleSoft Enterprise Human Resources 9.0 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.*

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- 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 Recruiting Processes," Setting Up Talent Acquisition Manager Implementation Defaults, page 7.

See Chapter 2, "Setting Up Recruiting Processes," Setting Up the Hiring Process, page 40.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up and Working with Search/Match".

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, "Increasing the Workforce," Adding Job Applicants.

Prerequisites

Before you can hire applicants, complete the following tasks:

1. Configure the integration broker.

   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.
2. Define the data you want to transfer from the applicant's record to the employee record.

The HR administrator hires the applicant by using the Manage Hires (HR_MANAGE_HIRES) component in Administer Workforce.

See *Enterprise PeopleTools PeopleBook: Integration Broker*

See Link to Setting Up the Hiring Process

See Hire Notifications page

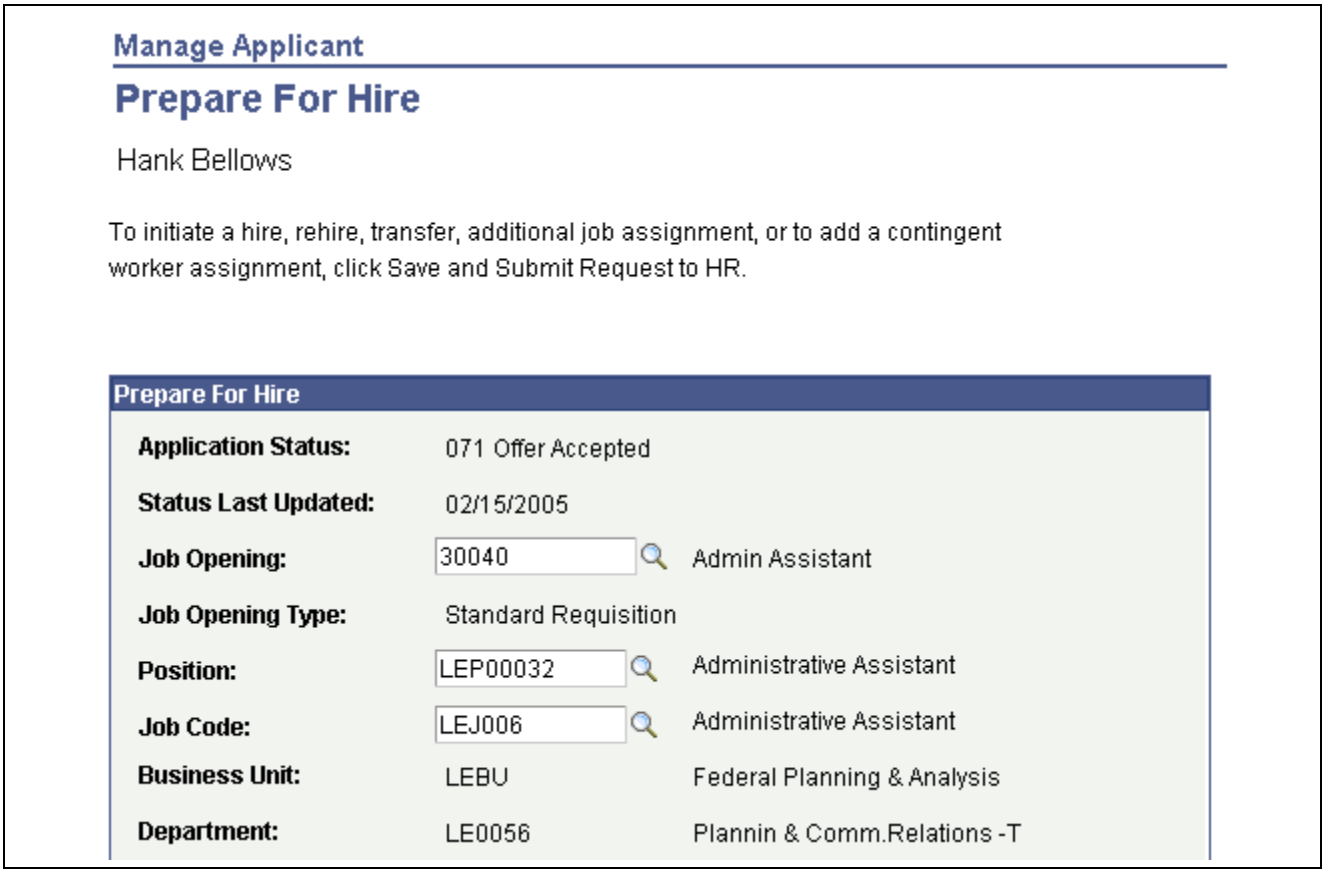
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Pages Used to Hire Applicants

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.

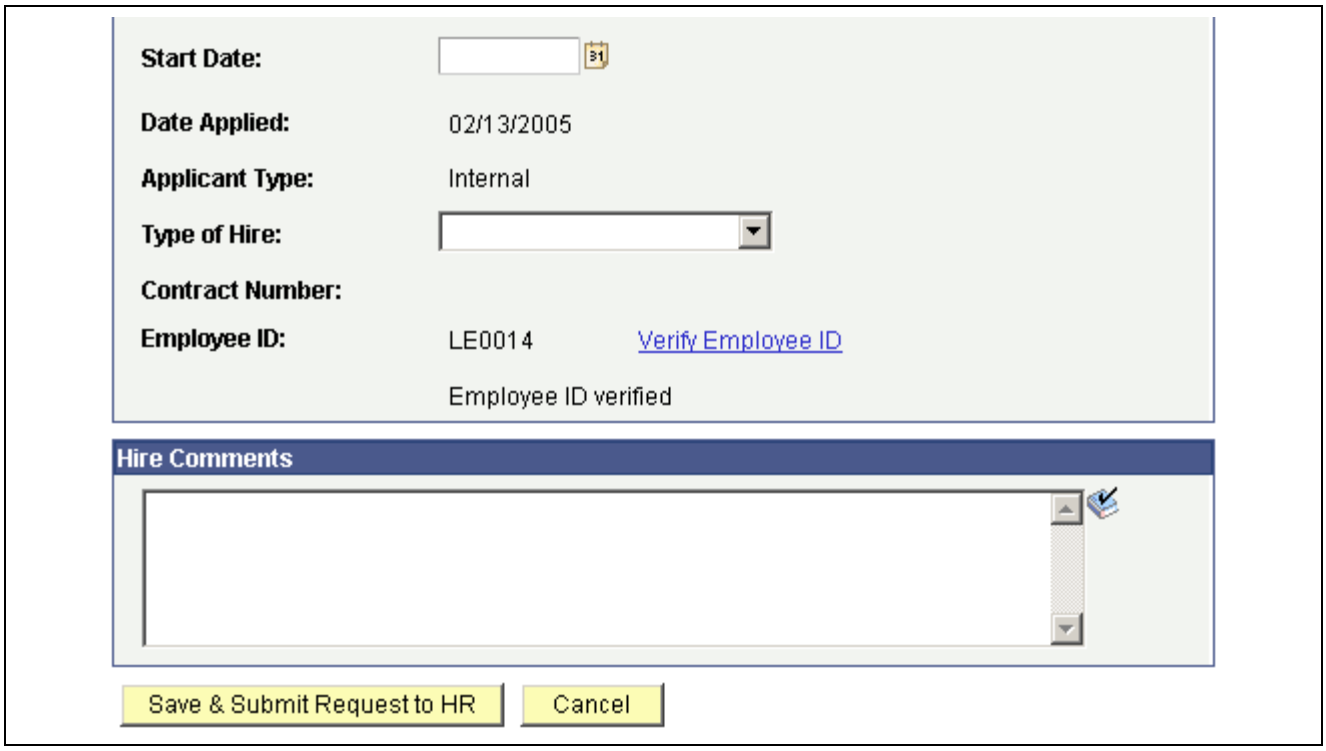
Preparing for Hire

Access the Prepare For Hire page.



Prepare For Hire page (1 of 2)

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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.

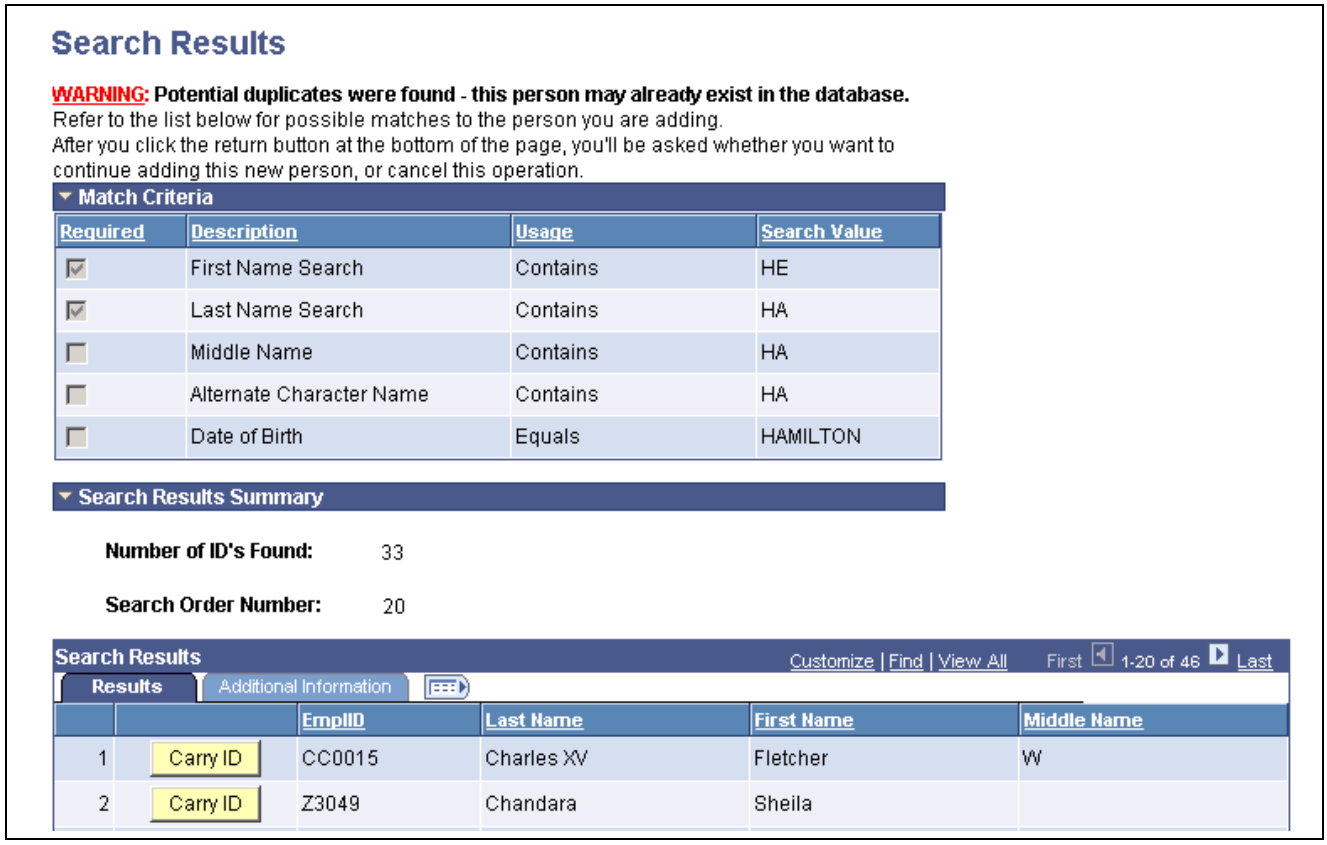
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Save & Submit to HR Click to send an email notification to the administrator. The applicant appears in the Manage Hires component in Administer Workforce.

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 9.0 PeopleBook: Administer Workforce*, "Increasing the Workforce," Reviewing Organizational Relationships.

Relations With Institution This field is not used by Talent Acquisition Manager

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(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 Enterprise Human Resources 9.0 PeopleBook: Administer Salary Packaging.*

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Salary Packaging*, "Modelling Salary Packages," Copying Applicant Salary Packages to the Employee Salary Package Component.

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CHAPTER 12

Managing Job Openings

This chapter discusses how to:

- Search for job openings.
- Manage job openings.

Searching for Job Openings

This section provides an overview of job opening searches and discusses how to:

- Build the job index.
- Search for job openings.
- Browse job openings.

Understanding Job Opening Searches

There are two methods to search for existing job openings:

- Find Job Openings.

  Find Job Openings enables you to search for specific job openings based on specific criteria.

- Browse Job Openings.

  Browse Job Openings displays a list of job openings based on selected criteria.

Because job openings are always being added to the database, you must continually build the index to ensure that all records in the database will show in the search results.

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Pages Used to Search for Existing Job Openings

Page Name	Object Name	Navigation	Usage
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.
Find Job Openings	HRS_JO_FIND_JOB	Recruiting, Find Job Openings, Find Job Openings	Search for existing job openings.
Browse Job Openings	HRS_JO_360_LAUNCH	Recruiting, Browse Job Openings, Browse Job Openings	View existing job openings.

Building the Job Index

Access the Build Job Index page.



Build Job Index page

Job Posting Search Collection

This run control page initiates the Verity Job Posting Index Build (HRS_JSCH_IDX) process. This process can run in two modes.

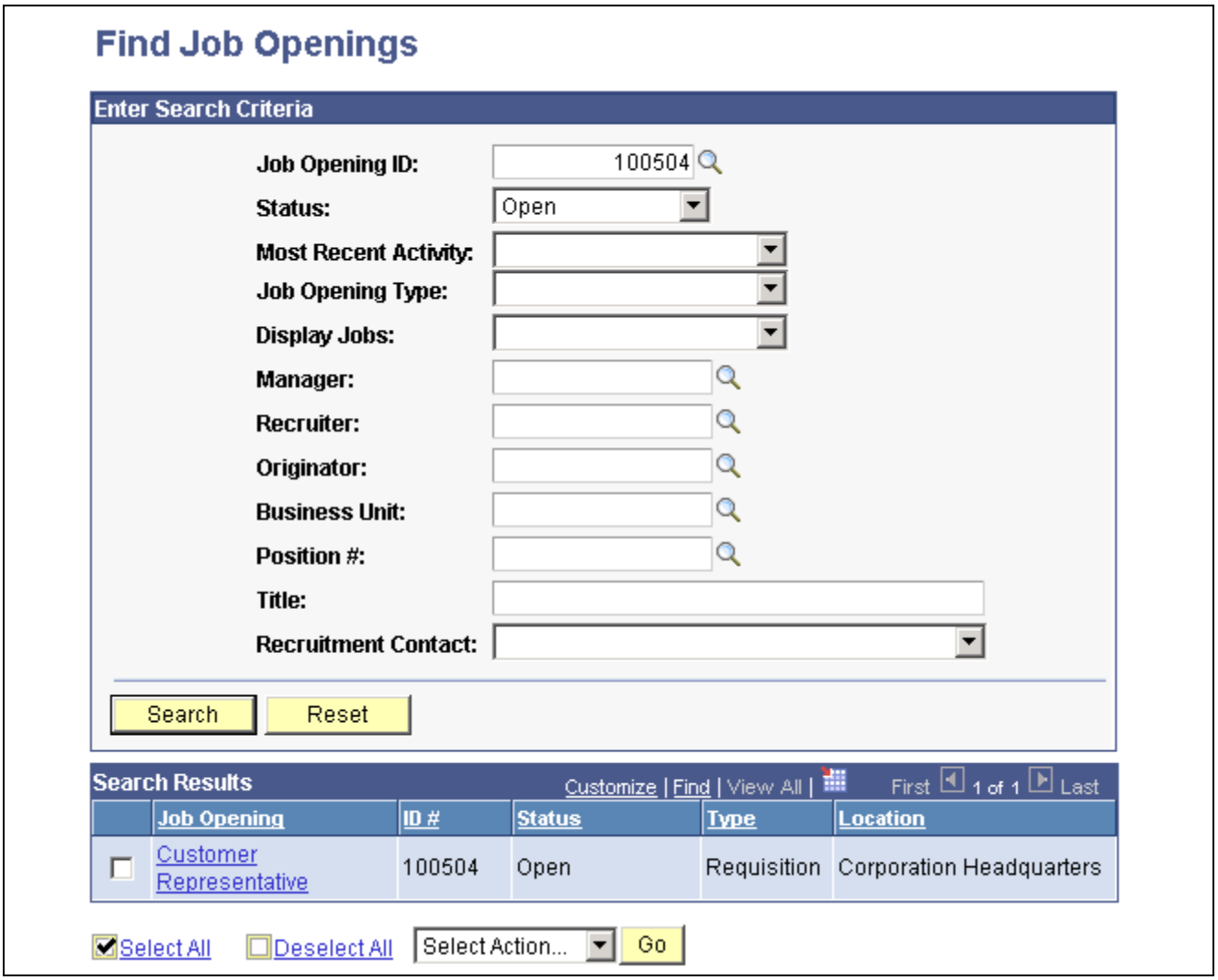
Create New Creates a new job posting index. If you enter a date in the Open Date From field all job postings with a posting open date later than the specified date are indexed.

Update Existing Adds, updates, and deletes entries in an existing index file.

Searching for Job Openings

Access the Find Job Openings page.

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Find Job Openings page

Enter Search Criteria

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*
- *Closed*
- *Denied*
- *Draft*
- *Hold*
- *Open*
- *Pending*

Most Recent Activity Select the date range that you want to define which job openings to include in the search. Options are:

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- *Last 2 Weeks*
- *Last 3 Days*
- *Last Month*
- *Last Week*
- *Last Year*
- *Today*
- *View All*
- *Yesterday*

Job Opening 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*
- *Jobs Assigned to me*
- *Jobs Associated to me*
- *Jobs Created by me*

Manager Enter or select a manager ID to include in the search.

Recruiter Enter or select a recruiter ID to include in the search.

Originator Enter or select a creator ID to include in the search.

Business Unit Enter or select a business unit to include in the search.

Position Enter or select a position to include in the search.

Title Enter a job posting title to include in the search.

Recruitment Contact Select a recruitment content to include in the search.

Search Click to execute the search.

Reset Click to clear the search criteria fields.

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*.

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Browsing for 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.

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Managing Job Openings

This section provides an overview of job opening pages, lists common elements, and discusses how to:

- Review applicants linked to job openings.
- Review job opening activity.
- Add notes to job openings.
- Add attachments to job openings.
- Add expenses to job openings.
- Review job opening details.

Understanding Job Opening Pages

The Job Opening page provides a single point from which you can complete many job and applicant related recruiting tasks. For job related tasks, you can:

- Copy an existing job opening to create a new one.
- Create a new job opening.
- Review activity, notes, attachments, and expenses.
- Review job opening detailed information.

For applicant related tasks, you can:

- View applicants linked to job openings.
- Search for applicants.
- Screen applicants.
- Schedule interviews.
- Add applicants to new and saved lists.
- Change applicant status.
- Create interview evaluations.
- Create salary packages.
- Forward applicants.
- Link applicants to job openings.
- Manage applicant checklists.
- Initiate pre-employment checks.
- Initiate the hire process.
- Prepare job offers.
- Route applicants.
- Send correspondences.

You access the Job Opening page through the Find Job Opening page.

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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.

Return to Previous Page Displays either the Find Job or Browse Jobs page.

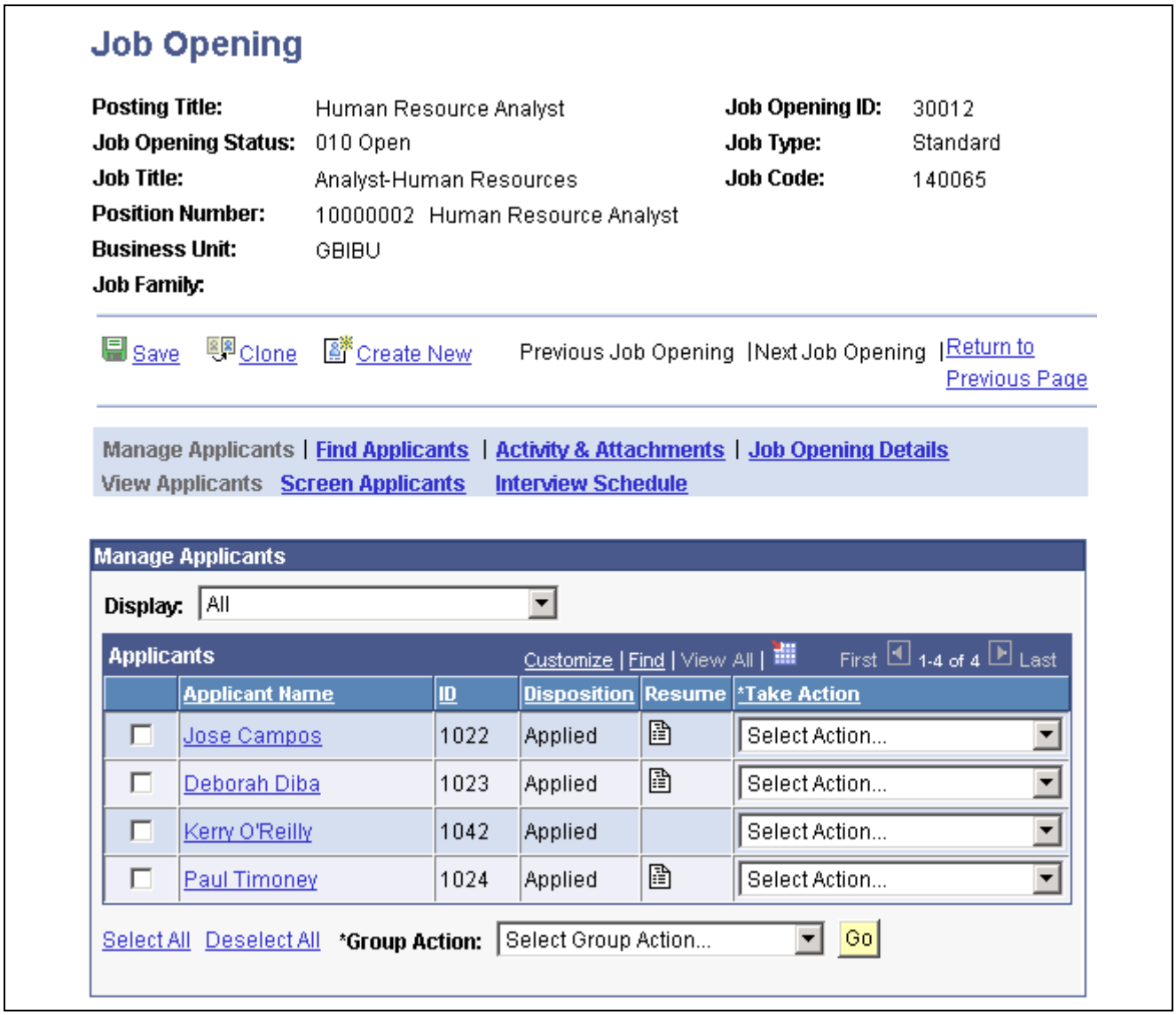
Pages Used to Manage Job Openings

Page Name	Object Name	Navigation	Usage
Find Job Opening	HRS_JO_FIND_JOB	Recruiting, Find Job Opening	Search and select job openings.
Job Opening - Manage Applicants - View Applicants	HRS_JO_360	Click the job opening link in Search Results group box on the Find Job Opening page.	Review job opening information.
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.
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.

Reviewing Applicants Linked to Job Openings

Access the Job Opening - Manage Applicants page.

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Job Opening - Manage Applicants page

Manage Applicants

Display Select the status by which the list of applicants will display.

Applicants

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.

Disposition 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:

- *Add Applicant to New List:* Displays the Create New List page.

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- *Add Applicant to Saved List:* Displays the Select Applicant List page.
- *Change Applicant Status:* Displays the Select New Applicant Status page.
- *Create Interview Evaluation:* Displays the Interview Evaluation page.
- *Create Salary Package Model:* Displays the Applicant Model page.
- *Forward Applicant:* Displays the Forward Applicant page.
- *Link Applicant to Job:* Displays the Link to Job Opening page.
- *Manage Applicant Checklists:* Displays the Applicant Checklist page.
- *Manage Interviews:* Displays the Schedule Interview page.
- *Pre-Employment Check:* Displays the Pre-employment Check page.
- *Prepare for Hire:* Displays the Prepare for Hire page.
- *Prepare Job Offer* Displays the Prepare Job Offer page.
- *Reject Applicant* Displays the Link to Job Opening page.
- *Route Applicant* Displays the Route Applicant page.
- *Send Correspondence* Display the Send Correspondence page.

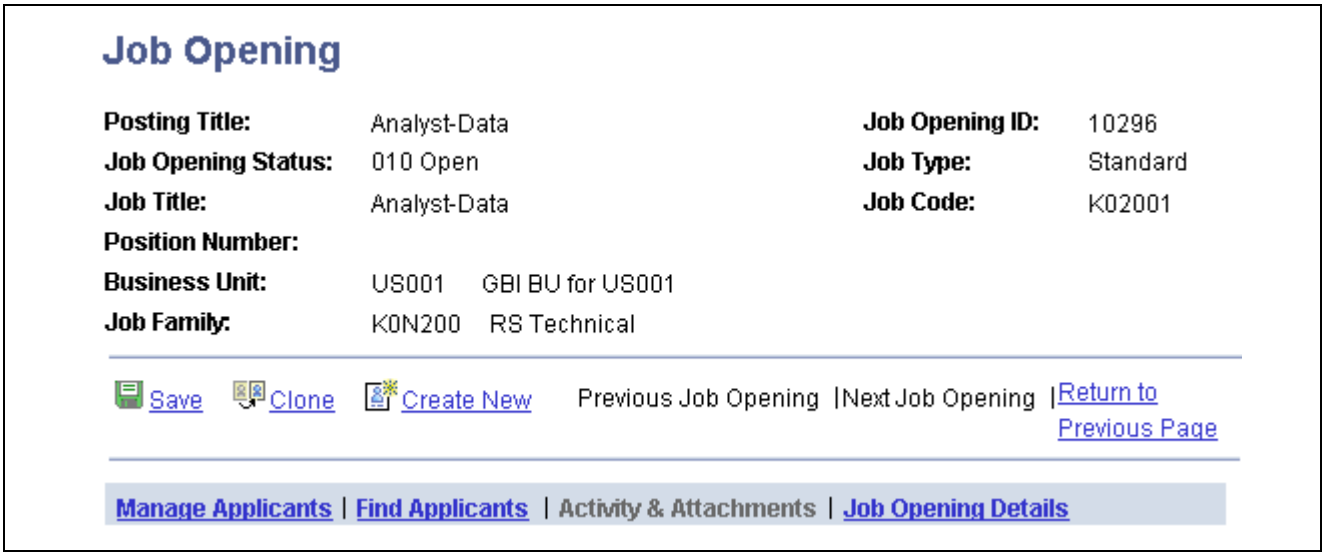
See Chapter 14, "Managing Applicants," page 281.

See Chapter 10, "Making Job Offers," page 233.

See Hiring Applicants

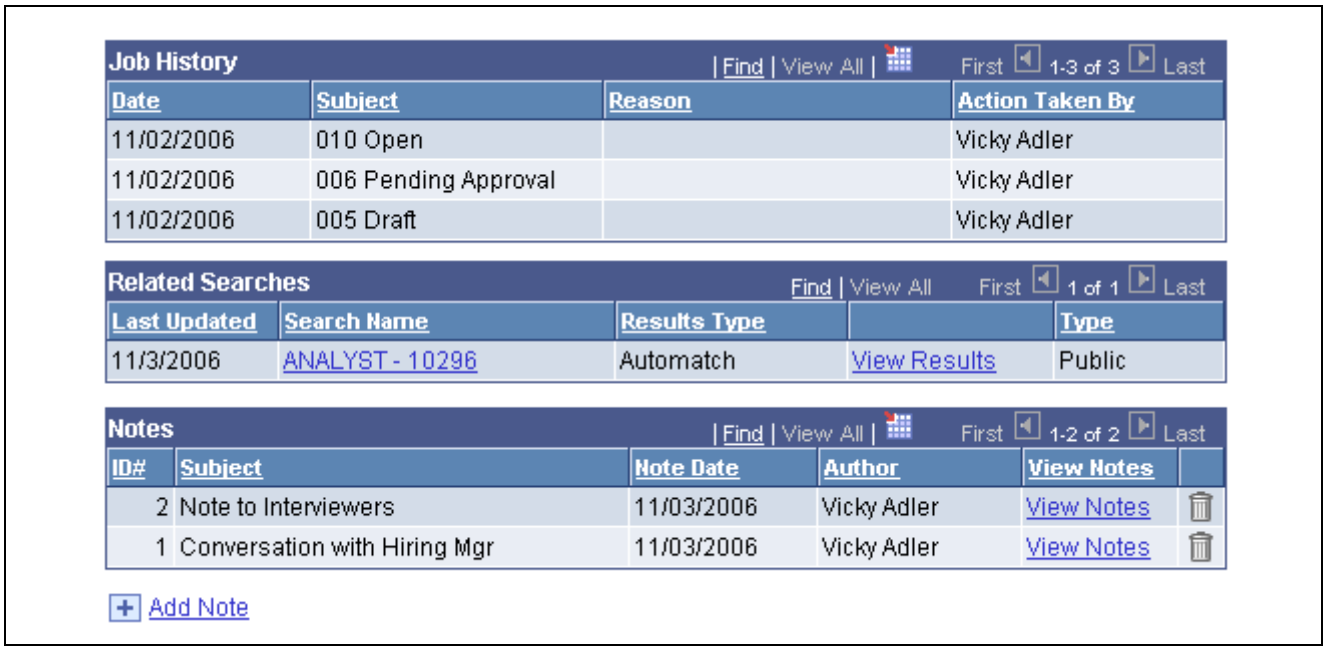
Reviewing Job Opening Activity

Access the Job Opening - Activity & Attachments page.



Job Opening - Activity & Attachments page (1 of 3)

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Job History | Find | View All | First 1-3 of 3 Last

Date	Subject	Reason	Action Taken By
11/02/2006	010 Open		Vicky Adler
11/02/2006	006 Pending Approval		Vicky Adler
11/02/2006	005 Draft		Vicky Adler

Related Searches Find | View All First 1 of 1 Last

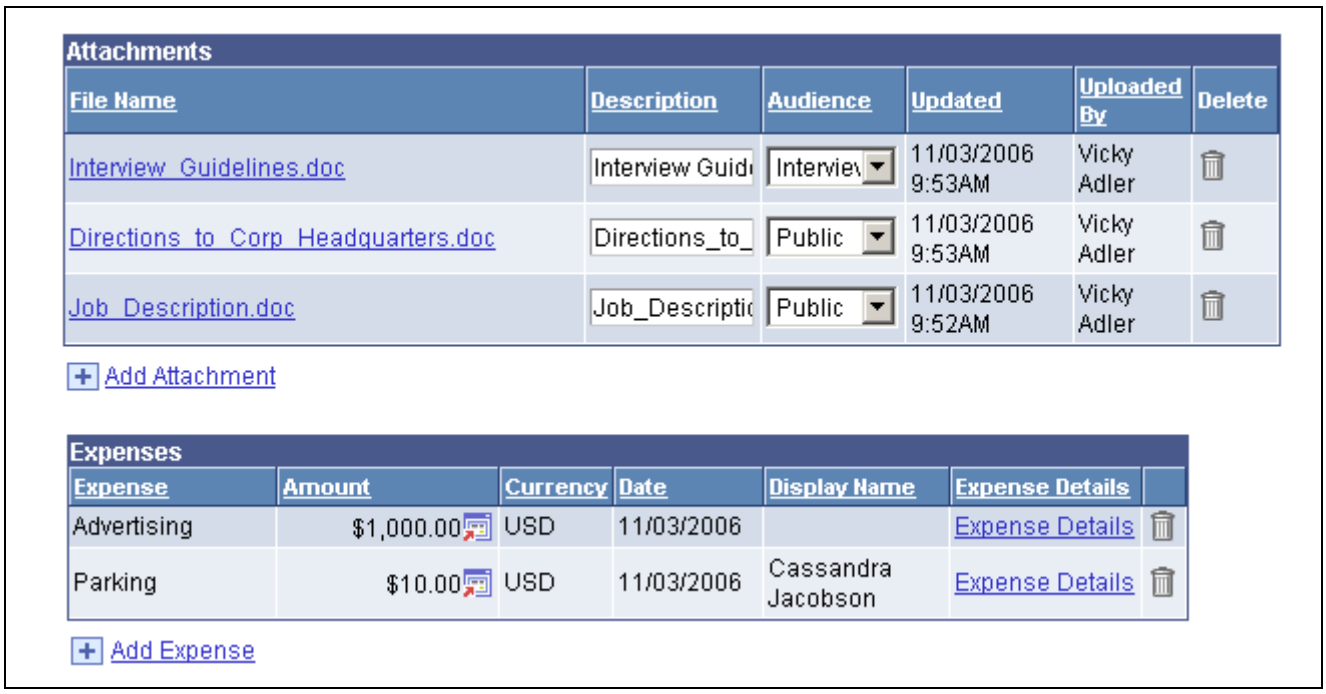
Last Updated	Search Name	Results Type		Type
11/3/2006	ANALYST - 10296	Automatch	View Results	Public

Notes | Find | View All | First 1-2 of 2 Last

ID#	Subject	Note Date	Author	View Notes
2	Note to Interviewers	11/03/2006	Vicky Adler	View Notes
1	Conversation with Hiring Mgr	11/03/2006	Vicky Adler	View Notes

Add Note

Job Opening - Activity & Attachments page (2 of 3)



Attachments

File Name	Description	Audience	Updated	Uploaded By	Delete
Interview_Guidelines.doc	Interview Guid	Intervie	11/03/2006 9:53AM	Vicky Adler	
Directions_to_Corp_Headquarters.doc	Directions_to_	Public	11/03/2006 9:53AM	Vicky Adler	
Job_Description.doc	Job_Descripti	Public	11/03/2006 9:52AM	Vicky Adler	

Add Attachment

Expenses

Expense	Amount	Currency	Date	Display Name	Expense Details	
Advertising	$1,000.00	USD	11/03/2006		Expense Details	
Parking	$10.00	USD	11/03/2006	Cassandra Jacobson	Expense Details	

Add Expense

Job Opening - Activity & Attachments page (3 of 3)

Job History

This group box displays the activity history related to the job opening. Any changes made to the job opening status are reflected in this grid.

Searches/Related Applicant Searches

This group box displays a list of saved applicants searches that have a job opening as part of the search criteria. You can click the Name link to display the search criteria and the View Results link to display the search results.

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Notes

This group box displays a list of notes related to the job opening.

View Note Click to display the Add Note page and view the content of the note.

Add Note Click to display the Add Note page.

Attachments

This group box displays a list of attachments related to the job opening.

Add Attachment Click to display a browser window, where you can search for document to attach to the job opening.

Expenses

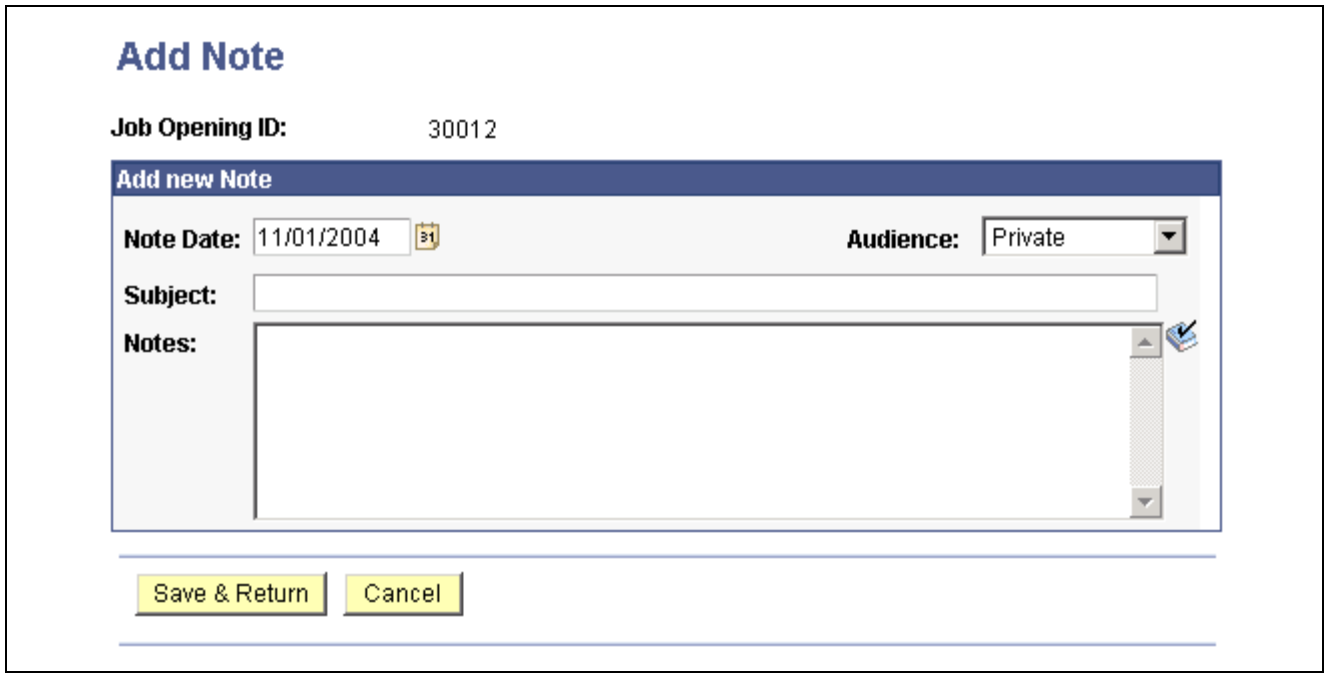
This group box displays a list of expenses associated to the job opening.

Expense Detail Click to display the Add Expense page and view the detailed information of the expense.

Add Expense Click to display the Add Expense page, where you can add a new job opening related expense.

Adding Notes to Job Openings

Access the Add Note page.



Add Note page

Audience Select the audience for this note. Valid options are:

- *Interview:* Interview notes can be viewed by anyone who has access to the job opening.

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- *Private:* Private notes can be viewed only by the originator.
- *Public:*Public notes can be viewed by anyone who has access to the job opening.

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.

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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 6, "Creating Job Openings," Creating Job Openings, page 124.

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CHAPTER 13

Managing External Job Postings

This chapter discusses how to:

- Search for external job postings.
- Manage external job postings.

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.

Prerequisites

Before you can search for job posting, build the job index.

See Chapter 12, "Managing Job Openings," Building the Job Index, page 260.

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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.

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*

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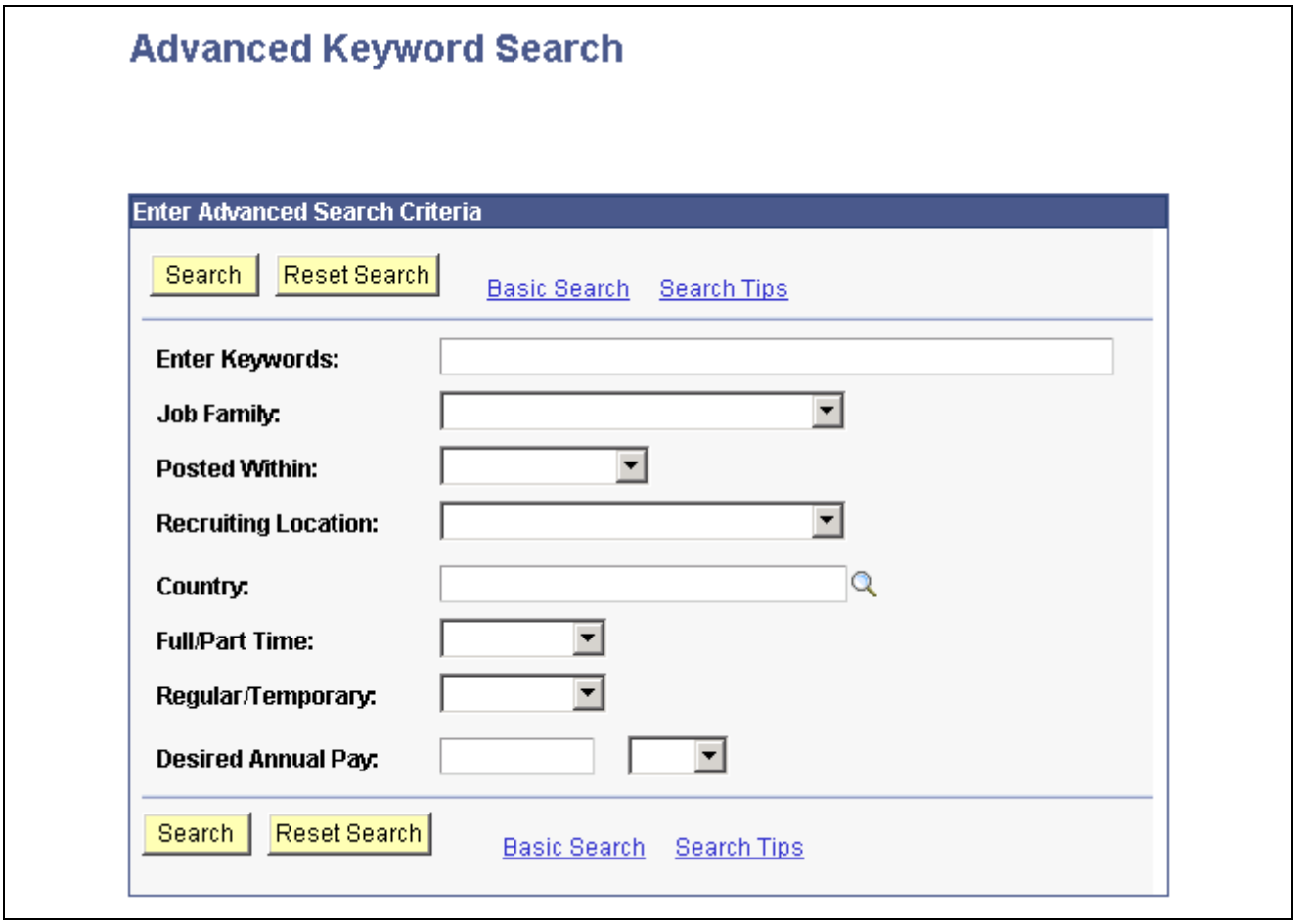
Search Results

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*

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Recruiting Location	Select a recruiting location. The system compares this to the Recruiting Location on the job opening.
Country	Select a country. The system compares this to the Country field on the job opening.
Full/Part Time	Select either full-time or part-time. The system compares this to the Full/Part Time field on the job opening.
Regular/Temporary	Select either regular or temporary. The system compares this to the Regular/Temporary field on the job opening.
Desired Annual Pay	Enter an amount and select a currency code.

Managing External Job Postings

This section provides an overview of external job postings and discusses how to:

- Post, update, and unpost external job postings.
- Review external job posting transaction history.
- Review the integration log.

Understanding External Job Postings

The Manage External Postings (HRS_EXTPOST) component enables you to post, update, or unpost job postings from job boards, recruitment agencies, or service procurement providers.

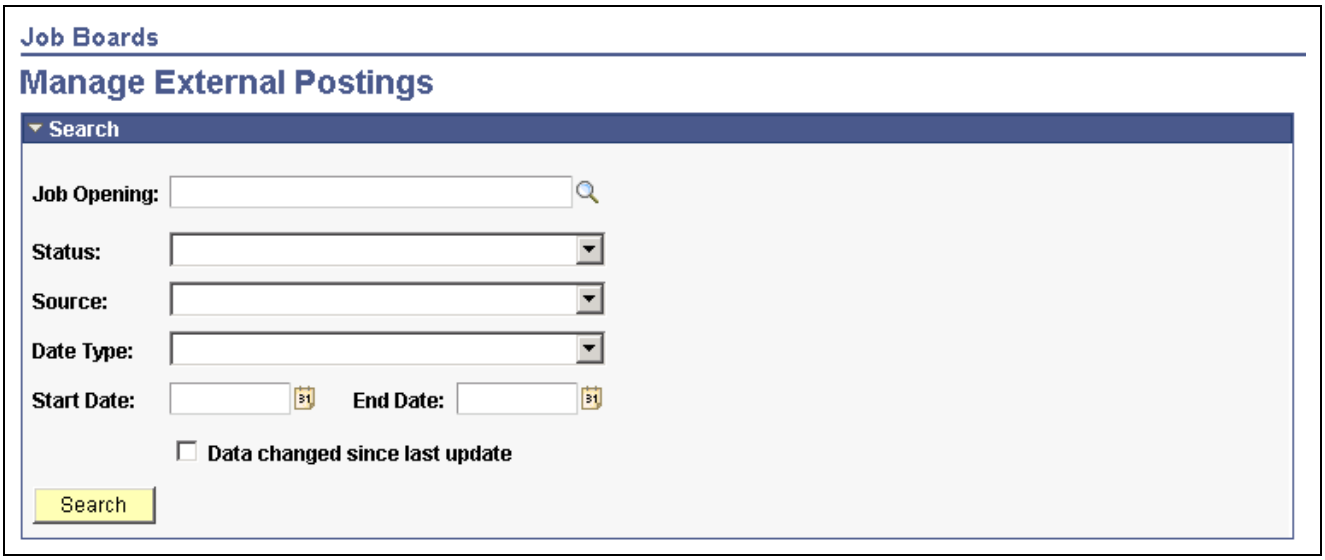
Pages Used to Manage External Job Postings

Page Name	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.

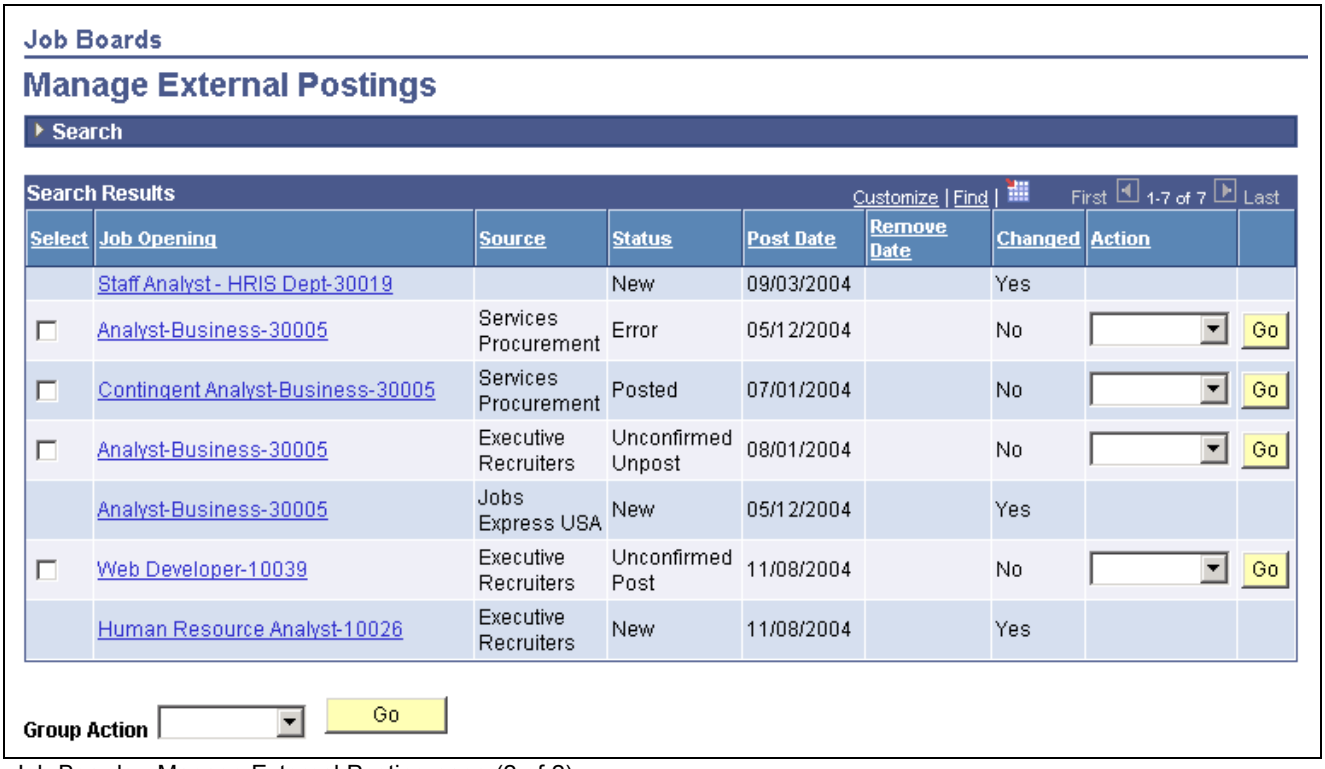
Posting, Updating, and Unposting External Job Postings

Access the Job Boards - Manage External Postings page.

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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:

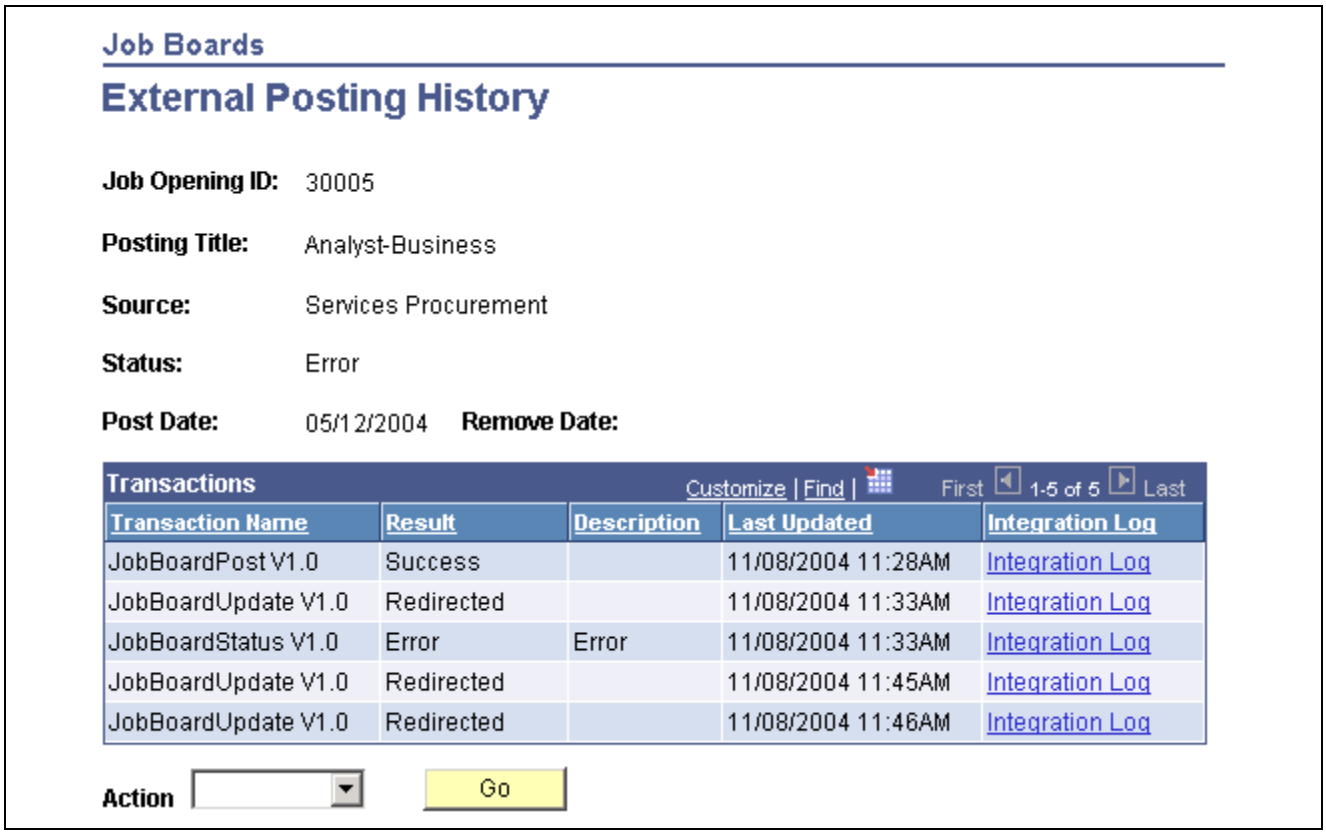
- *History:* Select to access the External Posting History page, where you can review the transactions history for the external job posting.

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- *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.

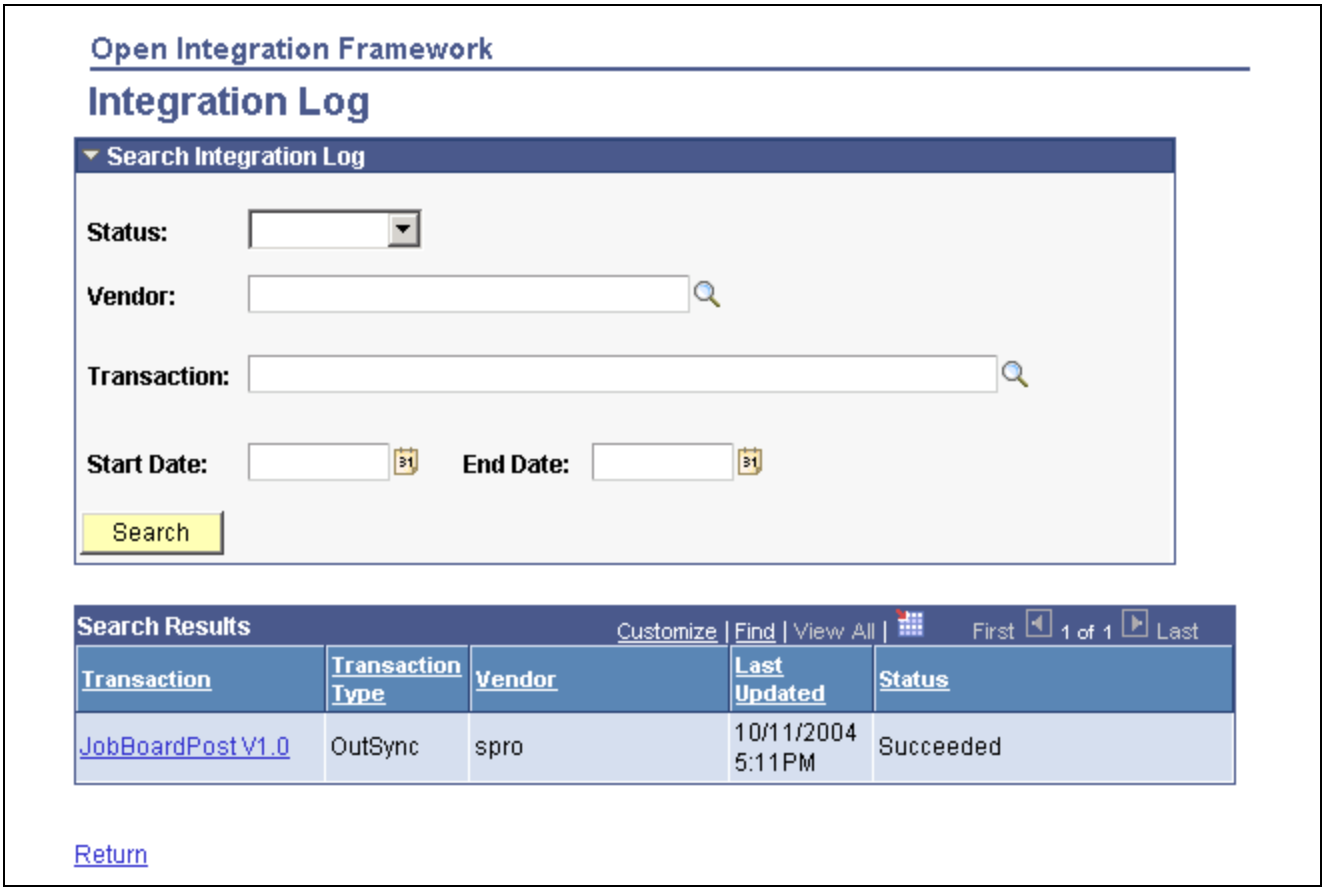
Last Updated Displays the date and time when the outgoing and incoming messages were sent and received.

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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.

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CHAPTER 14

Managing Applicants

This chapter discusses how to:

- Search for applicants.
- Use the job search agent.
- Track applicant activity.
- Review applications.
- Communicate with applicants
- Manage applicant lists.
- Create applicant checklists.
- Forward applicants.
- Link applicants to job openings.
- Change applicant statuses.
- Add external trainees.
- Process duplicate applicants.
- Generate applicant-related reports.

Searching for Applicants

This section provides overview of applicant searches and discusses how to:

- Build the applicant index.
- Define applicant searches.
- Define advanced keyword searches.
- Save search criteria.
- Run Automatch searches.

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Understanding the Build Applicant Index Process

Talent Acquisition Manager uses the Verity search engine in the basic and advanced searches. For a search to be successful, there must be an applicant search collection. The Build Applicant Index (HRS_SRCH_RUN_INDEX) component initiates a process, Verity Applicant Index Build (HRS_SRCH_IDX) Application Engine, that takes applicant information and creates an indexed pool of resumes and data. It is this collection that the system searches against. Because applicants are continually being added to the database, the Build Applicant Index process must be run frequently to reflect the new data being added.

Understanding Applicant Searches

Finding qualified applicants for your job openings is a major task for your recruiting staff. Talent Acquisition Manager uses the Find Applicants (HRS_REC_SCHAPP) component to complete:

- Applicant Search

  This search looks for specific records within your existing applicant data.

- Resume and Application Search

  This search uses the Verity search engine to find keywords in the applicant's resume text and the date on which an application was received. This search requires that you build the applicant index first.

- Advanced Keyword Search

  This search uses the Verity search engine to match a combination of keyword, date ranges and other applicant application related criteria. This search also requires that you build the applicant index first.

- AIRS

  This search uses AIRS Oxygen to search the internet for applicants.

Note. AIRS Oxygen is a web-based tool that searches various locations on the internet for applicant information, including job boards, resume banks, and news groups. AIRS Oxygen is licensed separately and solely by AIRS. If you wish to license an AIRS product you must contact AIRS.

Understanding Saved Searches

After you enter your search criteria, you can save the search criteria 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.

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. If you run the search again, the system replaces the old results with the new search results.

If you have search criteria that includes a specific job opening, the system requires that you save the search and the search results. This is done strictly for auditing purposes. When you run these searches, the system creates a record of the search and tracks it on the Manage Job Opening page: Activities & Attachments tab. If you run these searches again, the system does not replace the results, but creates a new record that is effective dated.

Remember that searching for applicants is only as accurate 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.

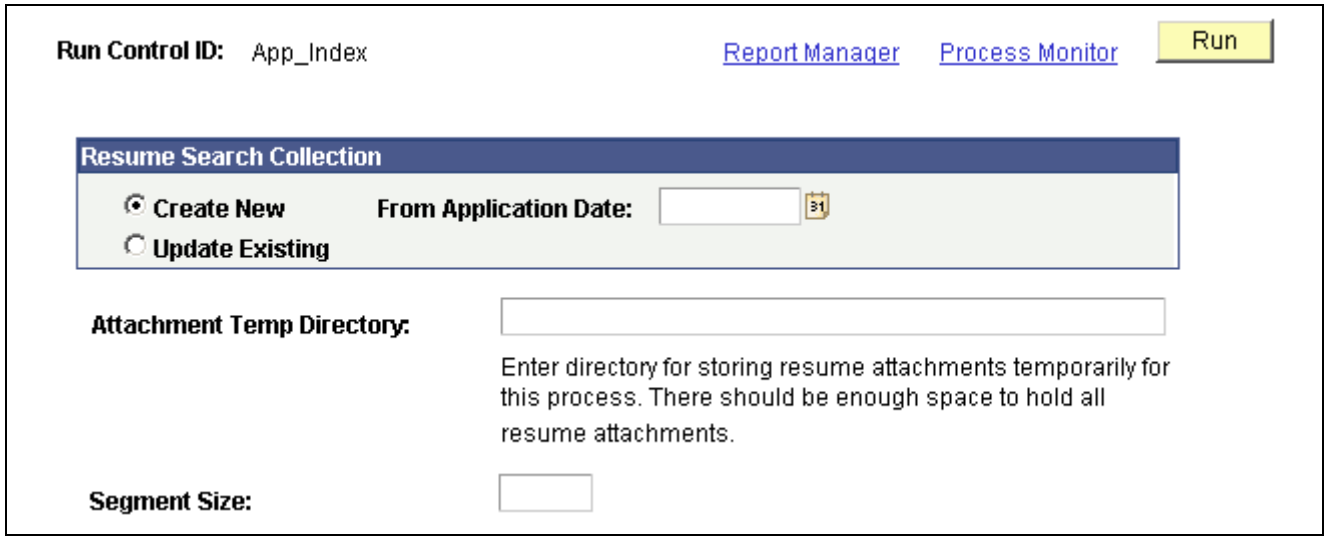
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Pages Used to Search for Applicants

Page Name	Object Name	Navigation	Usage
Build Applicant Index	HRS_SRCH_RUN_INDEX	Recruiting, Administration, Build Applicant Index	Build the applicant index.
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.
Run Automatch Search Agent	HRS_RUN_AMH	Recruiting, Administration, Run Automatch Search, Run Automatch Search Agent	Runs searches that have been designated as automatch.

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.

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Attachment Temp Directory (attachment temporary directory)

If you have set up an attachment directory to store resume when applicants apply online, 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.

Resumes stored in this temporary directory are not deleted after the Build Applicant Index process is run. You will have to manually delete the contents of the directory after the process is run.

Segment Size

Segment size accommodates situations where a high volume of applicant data needs to be indexed. This value represents the size (in days) and is used to form the basis of a date range segment.

Each Verity collection built will hold all application data falling within the given date range segment. The entire range of application data (from first to last application) will be split into date segments of the given size and each segment will be indexed in its own Verity collection.

This results in one or more Verity collections being built according to the segment size chosen. A smaller segment size will result with more collections for a given set of data and a larger segment size gives fewer collections.

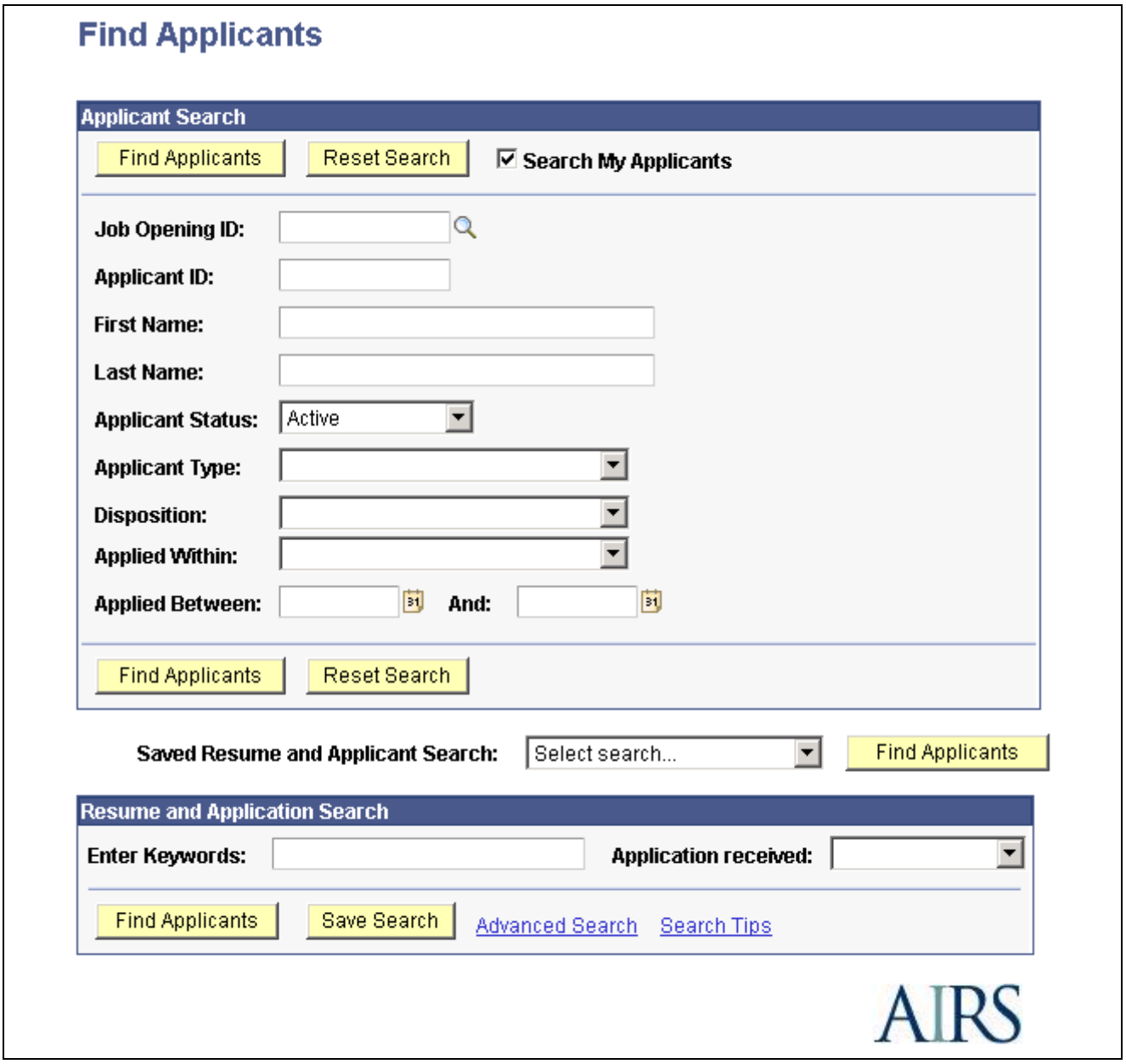
This is useful in high data volume situations where a multi-processor machine is available and results in a reduction in build time for the Applicant Index on such hardware. Choice of an effective segment size depends on several factors including expected number and distribution of incoming applications. When making this decision some analysis of the ‘expected’ mean distribution of incoming applications is required.

For example: Company XYZ expects, based on industry knowledge and past experience, to receive approx 100 resumes per day over a 6-month period. Company XYZ is equiped with hardware to enable the use of segmenting during the Applicant Index build and based on this distribution of data chooses a segment size of 20 days. This choice results in approx (100 x 20) applications being indexed per index collection and (6 x 30)/20 collections being created for this periods data.

Defining Applicant and Application and Resume Searches

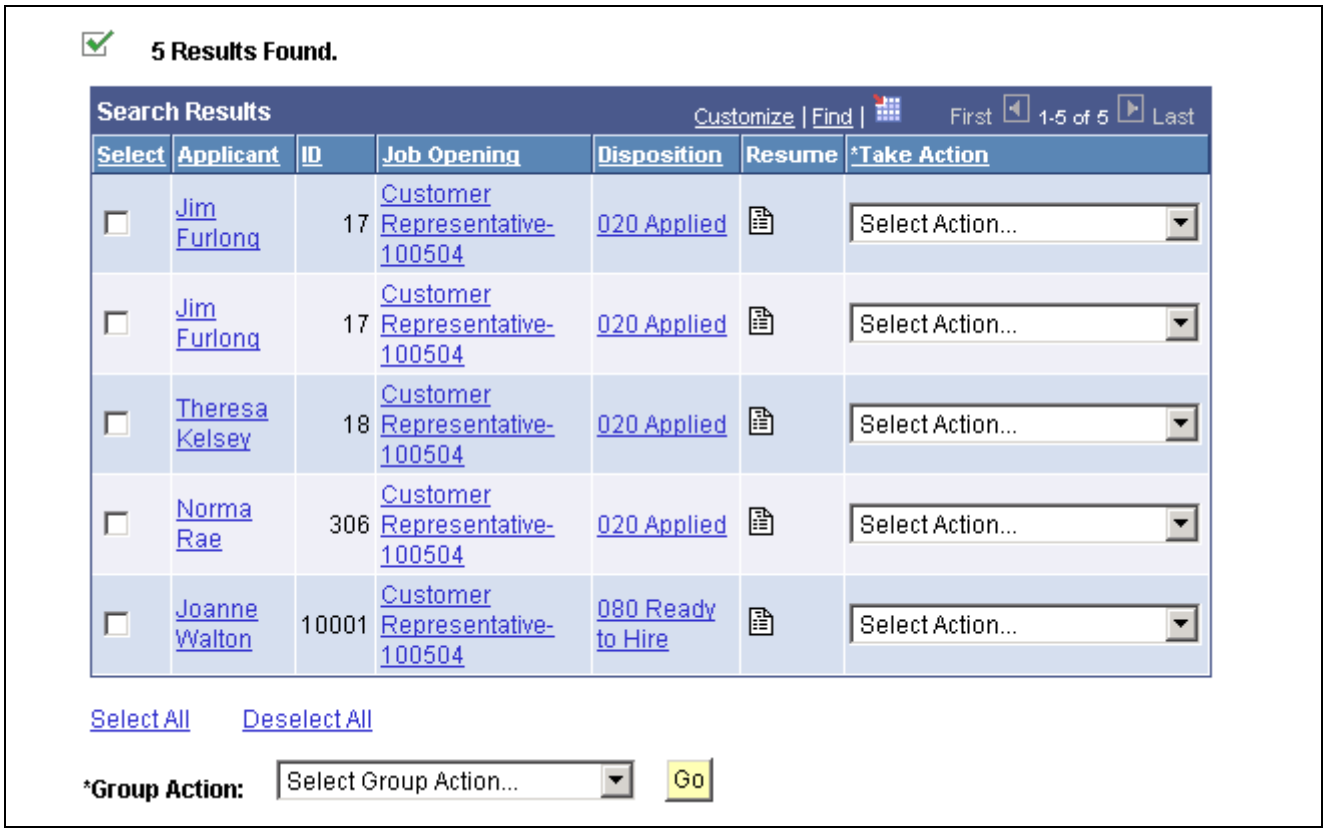
Access the Find Applicants page.

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Find Applicants page (1 of 2)

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Find Applicants page (2 of 2)

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.

Find Applicants Click this link to initiate the search.

Reset Search Click this link to clear the search fields.

Search My Applicants Select this check box if you want to see only the applicants attached to Job Openings to which you are either the originator, hiring manager, interviewer, or interested party. If the check box is not selected, the system looks at all applicants that match your search criteria.

Saved Resume and Applicant 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 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.

Enter Keywords 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.

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Application 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 this link to search the internet for applicants.

Search Results

Click to search the internet for applicants.

Applicant Click this link to display the Manage Applicant page.

ID Displays the applicant's identification number.

Job Opening Click this link to access the Job Opening page.

Status Click this link to access the Manage Applicant - Disposition Details page.

Resume Click this link to access the Manage Applicant - Applicant Resume page.

Take 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.*
- *Create Interview Evaluation.*
- *Forward Applicant.*
- *Link Applicant to Job.*
- *Make Active.*
- *Make Inactive.*
- *Prepare Job Offer.*
- *Prepare for Hire.*
- *Reject Applicant.*
- *Route Applicant.*
- *Schedule Interview.*
- *Send Correspondence.*

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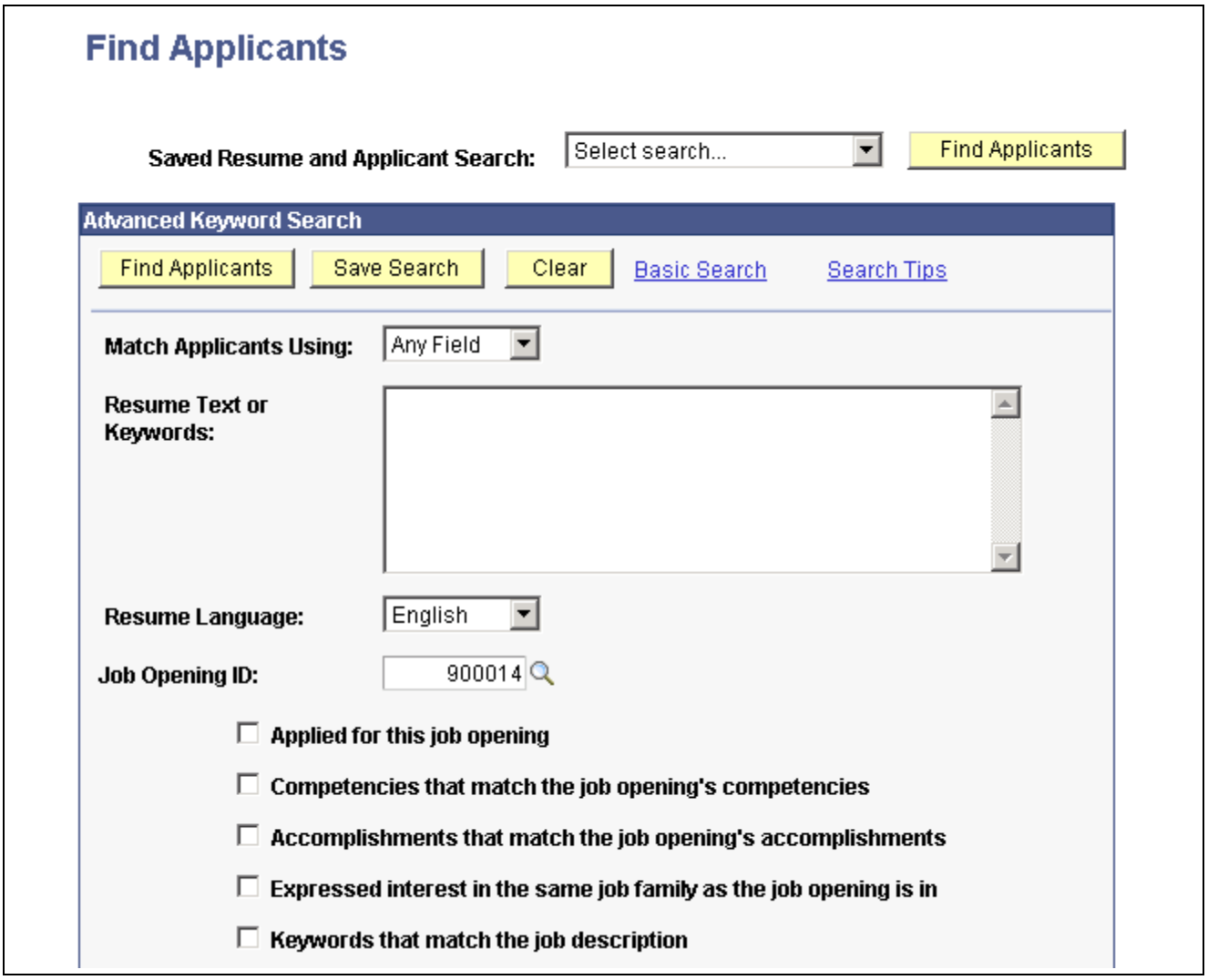
Select Group Action Select an action you want to make to the applicants that have the check box next to their name selected. Click the Go button to execute the action. Actions are:

- *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

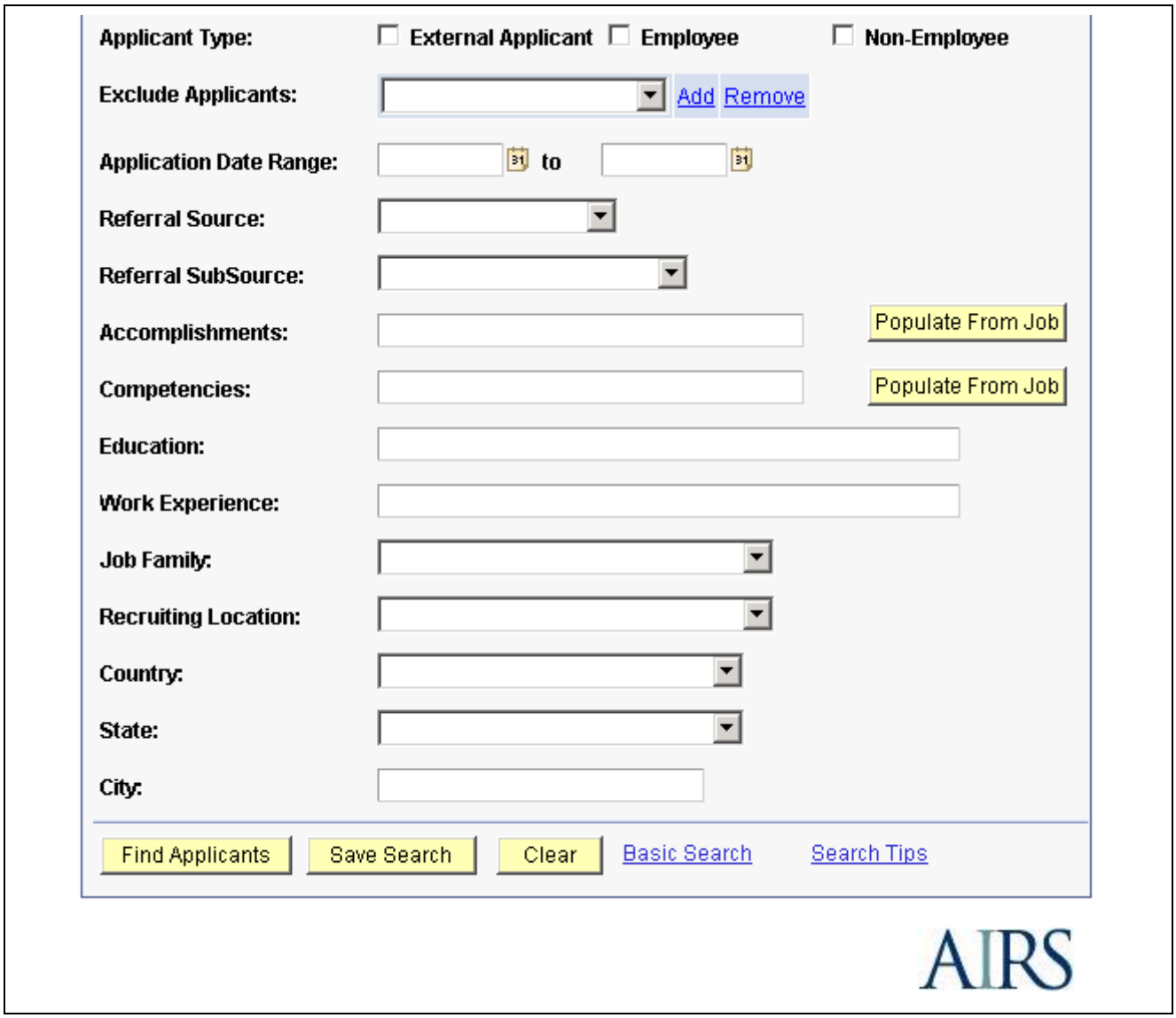
Access the Find Applicants page.

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Find Applicants (Advanced Keyword Search) page (1 of 2)

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Find Applicants (Advanced Keyword Search) page (2 of 2)

Saved Resume and Applicant 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

Find Applicant Click this button to initiate the search.

Save Search Click this button to display the Save Search page.

Clear Click this button to clear all the search fields.

Basic Search Click this link to display basic search page.

Search Tips Click this link to display the a page with parameters that can be used in the search fields.

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Match Applicants Using 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 or Keywords 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.

Note. If you enter a job opening, you must save the search for auditing purposes. The saved search and results can be tracked using the Manage Job Opening page: Activity & Attachments tab.

Display applicants in Applied status to the Job Opening This field appears if you entered a job opening ID.

Select this 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*

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Application Date Range to	Enter or select the beginning and ending date to use 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.
Populate from Job	Click this button if you want the accomplishments entered in the job opening copied into this field.
Competencies	Enter text that defines the competencies to include in the search.
Populate from Job	Click this button if you want the competencies entered in the job opening copied into this field.
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	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.

Searching the Internet

Access the Find Applicants page

To search the internet:

1. Select the AIRS link on the Find Applicants page.
2. On the AIRS Oxygen website, enter your search criteria and start the search.
3. Check the applicants returned by AIRS and identify potential candidates.

   You can save details of applicants that you plan to contact using the AIRS Oxygen options Save to Folder and Save to Disk.
4. Contact the applicants identified by the search to find out if they are interested in applying to your organization.
5. Load the applicants' details into your PeopleSoft database as follows:
   a. Navigate to the AIRS Oxygen website and display the applicant information.
   b. Click the Save to Talent Acquisition Manager link.

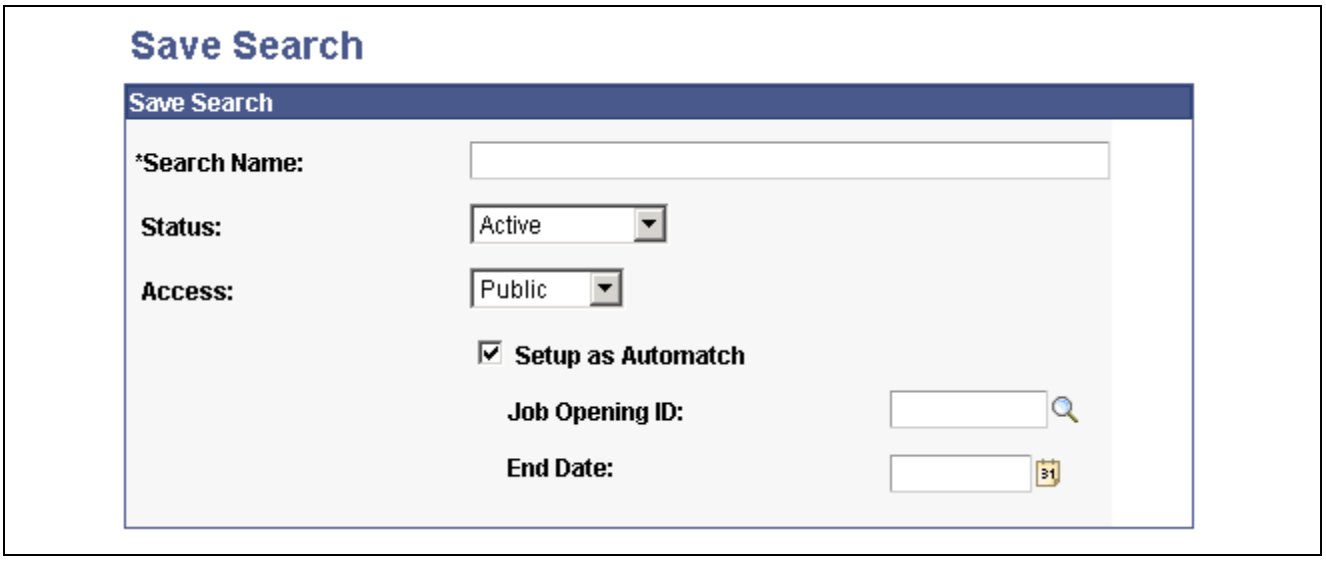
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The AIRS system displays the default email address previously set up. Accept the default address.

AIRS Oxygen emails the selected applicants' resumes to your resume processing account. The resume processing extracts applicant data from the resume and inserts it into the applicant data tables.

Saving Applicant Searches

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 this check box 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.

Running Automatch Saved Searches

Access the Run Automatch Search Agent page.



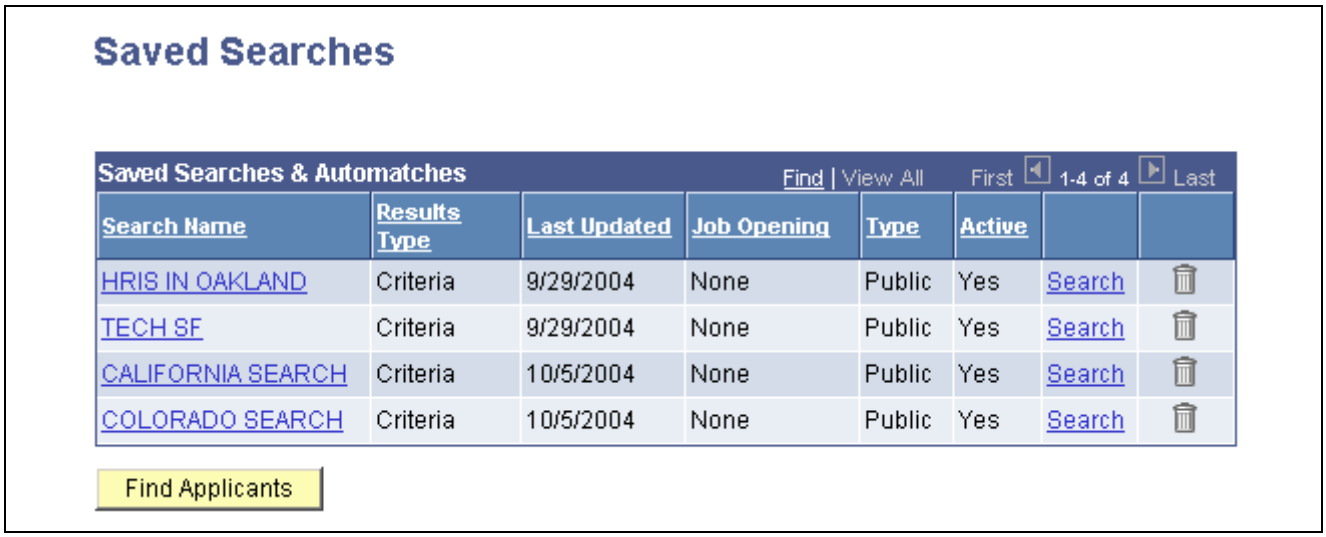
Run Automatch Search Agent page

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The Run Automatch Search (HRS_AM) 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 then link the applicants to the job opening.

Viewing Saved Searches

Access the Saved Searches page.



Saved Searches page

Using 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 9.0 PeopleBook, "Using Candidate Gateway," Searching for Job Openings

Understanding the Job Agent Process

In Candidate Gateway, applicants can create profiles for the types of jobs in which they are interested in applying. Administrators must run a process that matches those profiles against the current job openings.

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.

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See Chapter 2, "Setting Up Recruiting Processes," Defining Recruiting Installation Defaults, page 7.

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.

Prerequisites

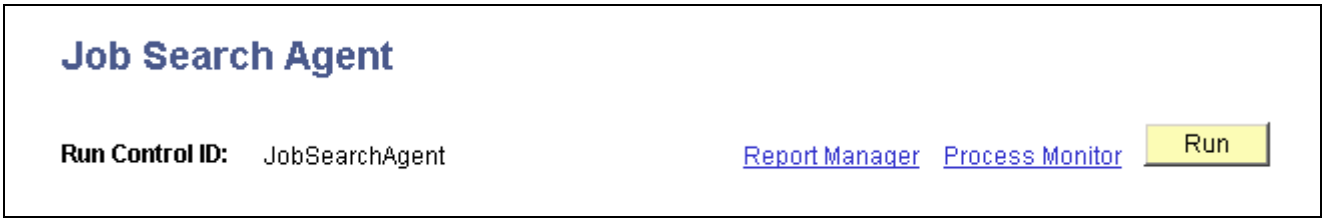
To use the job search agent, define the fields in the Apply Online group box on the Installation Options page.

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.



Job Search Agent page

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

See Also

Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications

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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 12, "Managing Job Openings," Reviewing Applicants Linked to Job Openings, page 265

(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.

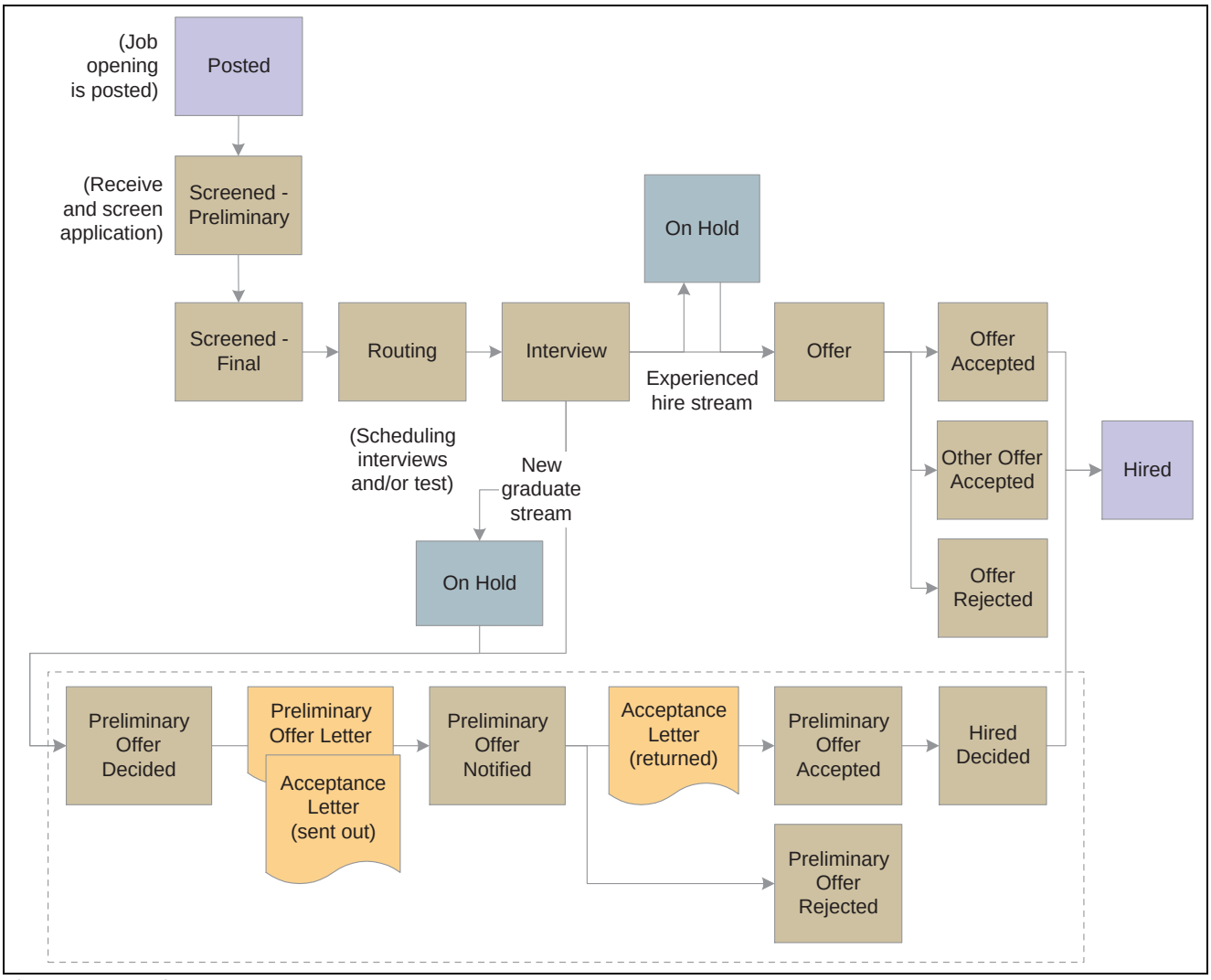
The recruitment process followed by most Japanese companies, however, requires *selectee* statuses between applicant and employee. Applicants become known as selectees when they have one of these four user-maintained preliminary offer statuses (applicant and selectee statuses are also known as *dispositions*:

- 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:

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Japanese recruitment stages

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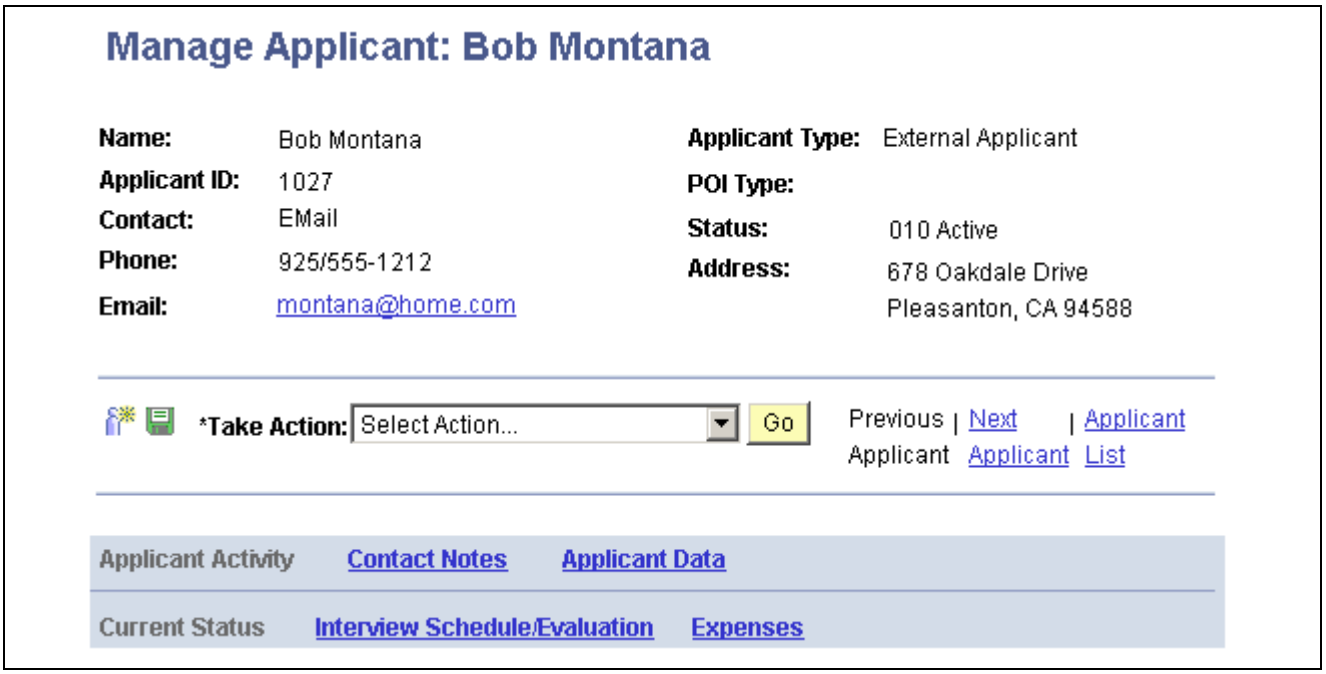
Pages Used to Track Applicant Activity

Page Name	Object Name	Navigation	Usage
Find Applicants	HRS_REC_SCHAPP	Recruiting, Find Applicants, Find Applicants	Search for and select applicants.
Manage Applicant - Applicant Activity - Current Status, Manage Applicant - Applicant Activity - Interview Schedule/Evaluation, Manage Applicant - Applicant Activity - Expenses	HRS_MANAGE_APP	Click an applicant name link in the Search Results grid on the Find Applicants page.	Review applicant data and perform various applicant related tasks.
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.
Applicant Resume	HRS_APP_RESUME	Click the Resume icon on the Manage Applicant - Applicant Activity: Current Status page.	View an applicant's resume.
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.

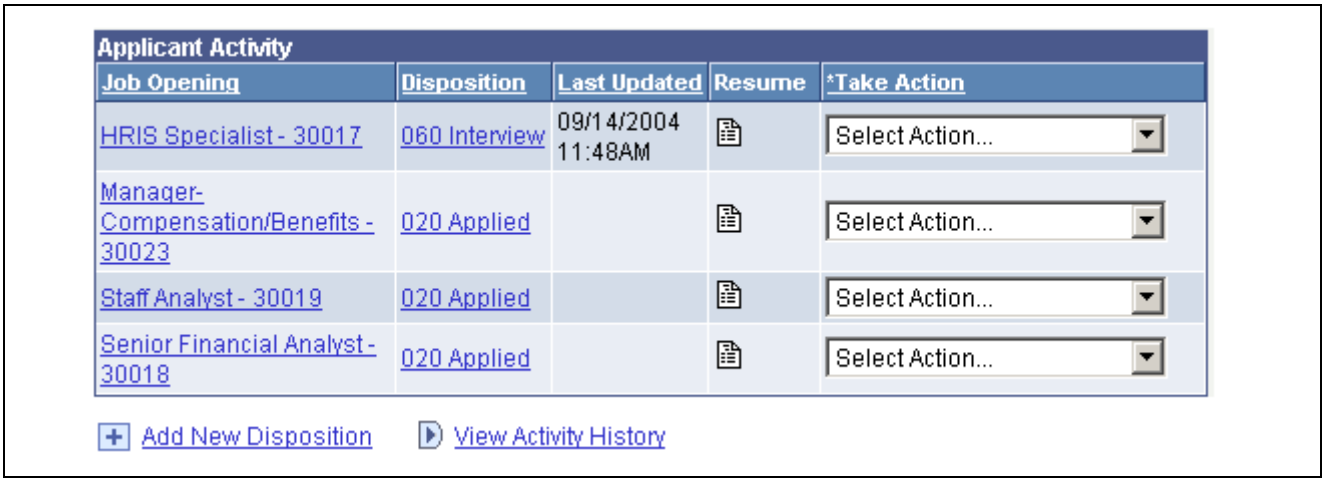
Reviewing Applicant Activity

Access the Manage Applicant - Applicant Activity page.

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Manage Applicant - Applicant Activity page: Current Status tab (1 of 2)



Manage Applicant - Applicant Activity page: Current Status tab (2 of 2)

Add Applicant

Displays the Add New Applicant page.

Save

Click this icon to save information you have entered.

Take Action

Select an action from the following choices:

- *Add Applicant to New List*, which displays the Create New List page.
- *Add Applicant to Saved List*, which displays the Select Applicant List page.
- *Add Person of Interest*, which displays the Add Person of Interest page.
- *Change Applicant Status*, which displays the Select New Applicant Status page.
- *Forward Applicant*, which displays the Forward Applicant page.

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- *Link Applicant to Job*, which displays the Link to Job Opening page.
- *Manage Applicant Contracts*, which displays the Contract Status/Content page.

  See Hiring Applicants, Creating Applicant Contracts
- *Merge as Source*, which displays the Merge as Source page.
- *Merge as Target*, which displays the Merge as Target page.
- *Pre-Employment Check*, which displays the Pre-employment Check page.

  See Hiring Applicants, Completing Pre-Employment Checks
- *Prepare for Hire*, which displays the Prepare for Hire page.

  See Hiring Applicants, Hiring Applicants
- *Send Correspondence*, which displays the Send Correspondence page.

Current Status

Click this link to display the applicant's current activity 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.

To see a list of historical activity for the dispositions listed above and these dispositions: Hold, Reject, Withdrawn, and Inactive, click the View Activity History link. The link changes to View Current Activity. You can toggle between the two views.

Note. If you are having problems seeing all applicant dispositions, check that your system is configured to display all applicant dispositions.

See Chapter 4, "Setting Up Recruiting Statuses," page 65.

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 the job opening link to access the Job Opening page for that job opening.

Disposition Click the disposition link to access the Disposition Details page, where you can view and make changes to an applicant's disposition for that job opening.

Resume Click this icon to display the Applicant Resume page, where you can view the applicant's resume for that job opening.

Take Action Select one of the following actions:

- *Create Interview Evaluation*, which displays the Interview Evaluation page.

  See Interviewing Applicants, Completing Interview Evaluations
- *Create Salary Package Model*, which displays the Applicant Model page.

  See Hiring Applicants, (AUS) Creating Salary Packages

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- *Evaluate Competencies*, which displays the Evaluate Competencies page.
- *Manage Applicant Checklists*, which displays the Applicant Checklist page.
- *Manage Interviews*, which displays the Interview Schedule page.

  See Interviewing Applicants, Scheduling Interviews
- *Prepare Job Offer*, which displays the Prepare Job Offer page.

  See Making Job Offers
- *Prepare for Hire*, which displays the Prepare for Hire page.

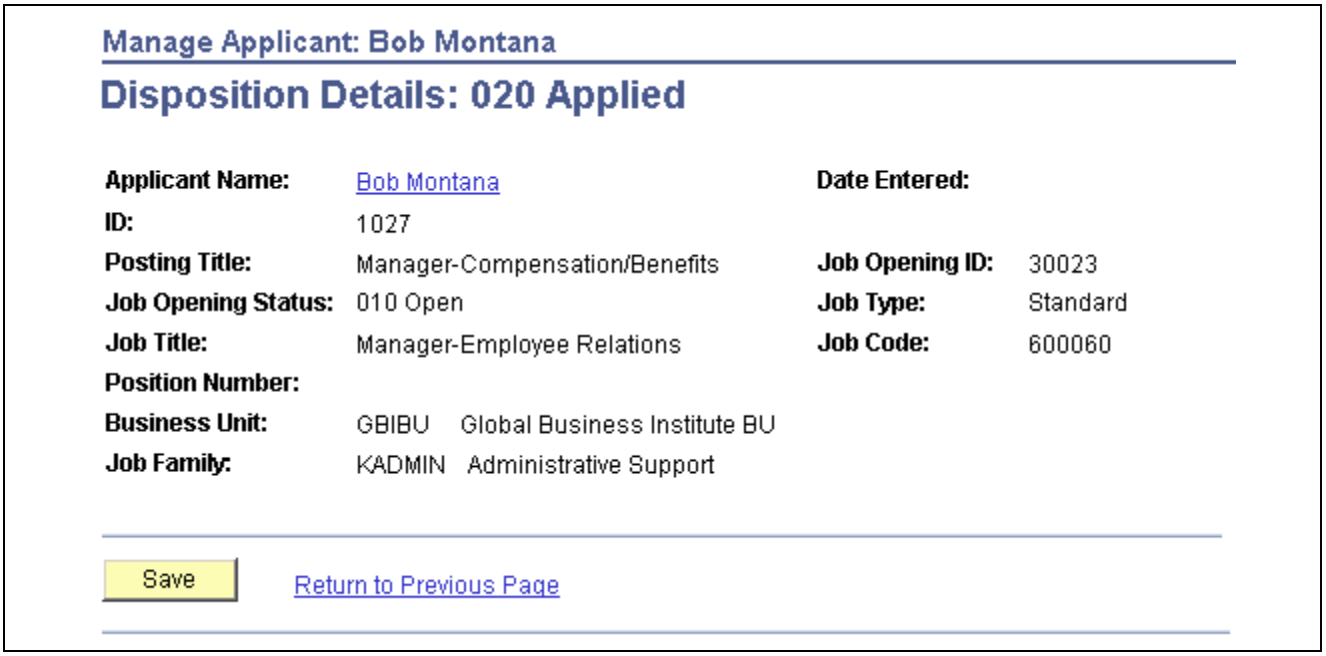
  See Hiring Applicants, Hiring Applicants
- *Reject Applicant*, which displays the Link to Job Opening page.
- *Route Applicant*, which displays the Disposition Details page.

  See Screening and Routing Applicants, Routing Applicants

Add New Disposition Click this link to access the Disposition Details page, where you can add a new disposition for the applicant.

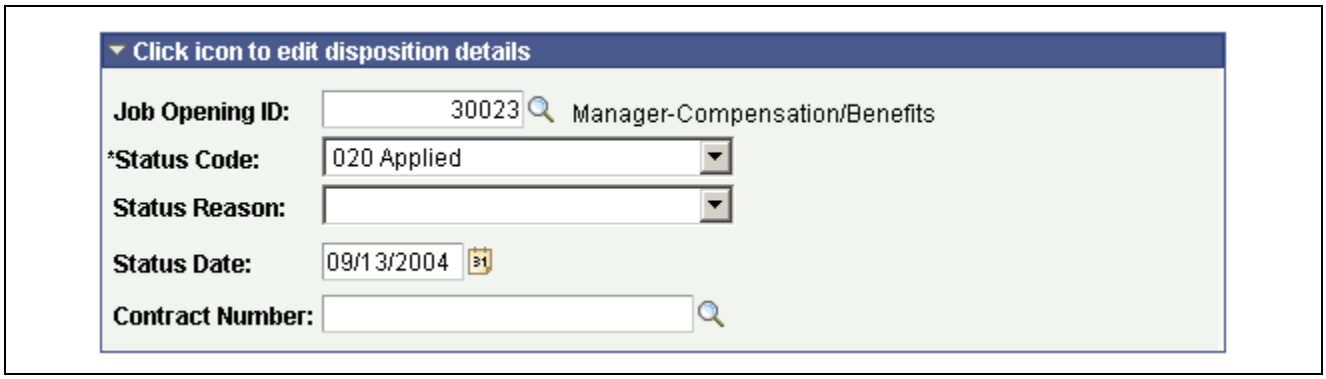
Editing Disposition Details

Access the Disposition Details page.



Manage Applicant - Disposition Details page (1 of 2)

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Manage Applicant - Disposition Details page (2 of 2)

Use this page to view and edit details on key disposition statuses.

See Chapter 9, "Interviewing Applicants," Making Final Recommendations, page 225.

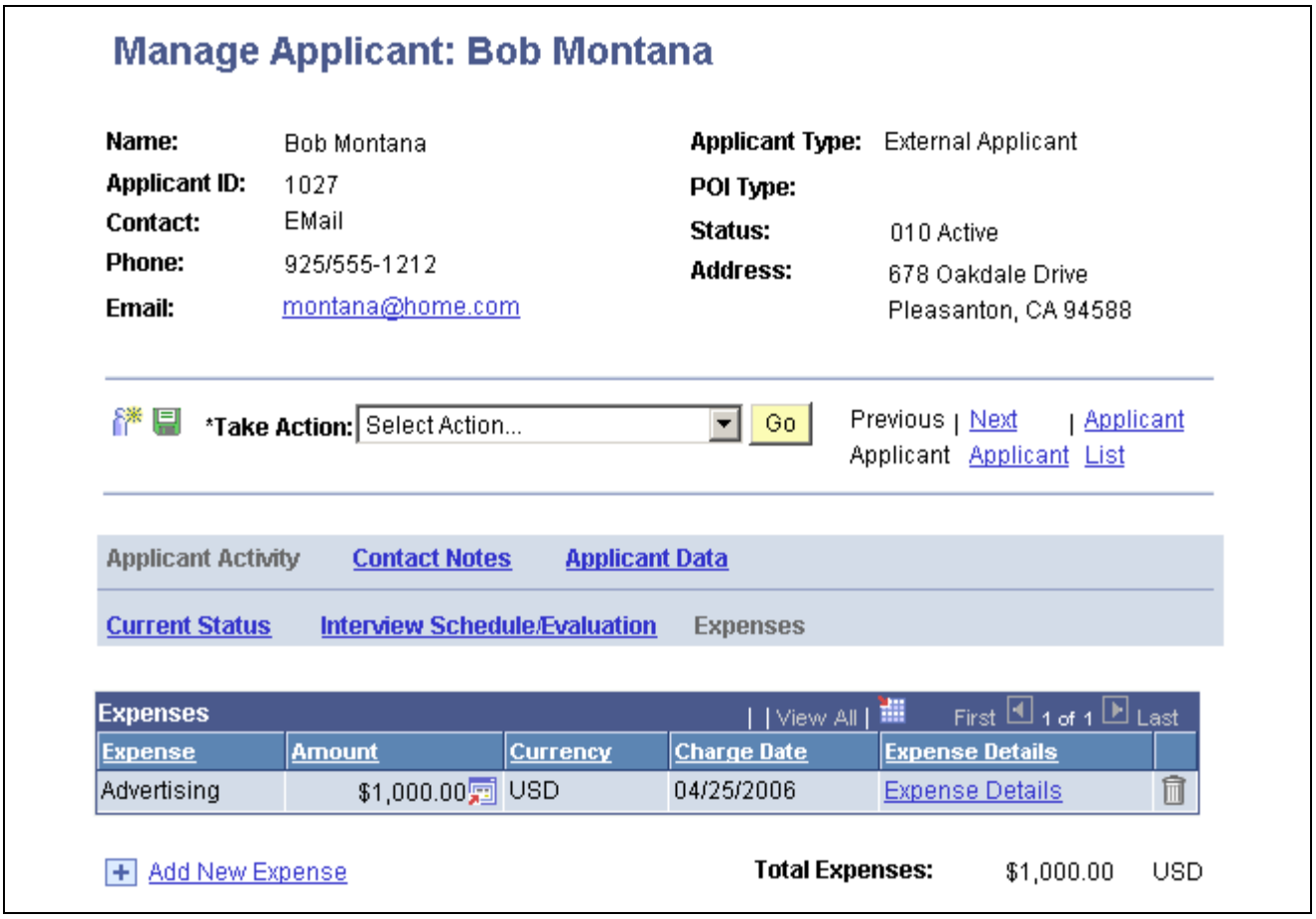
Click icon to edit disposition details

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. It is recommended 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.

Reviewing Applicant Expenses

Access the Manage Applicant - Applicant Activity - Expenses page.

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Manage Applicant - Applicant Activity - Expenses page

Expenses

Access the Manage Applicant - Expenses page by clicking the Expenses link.

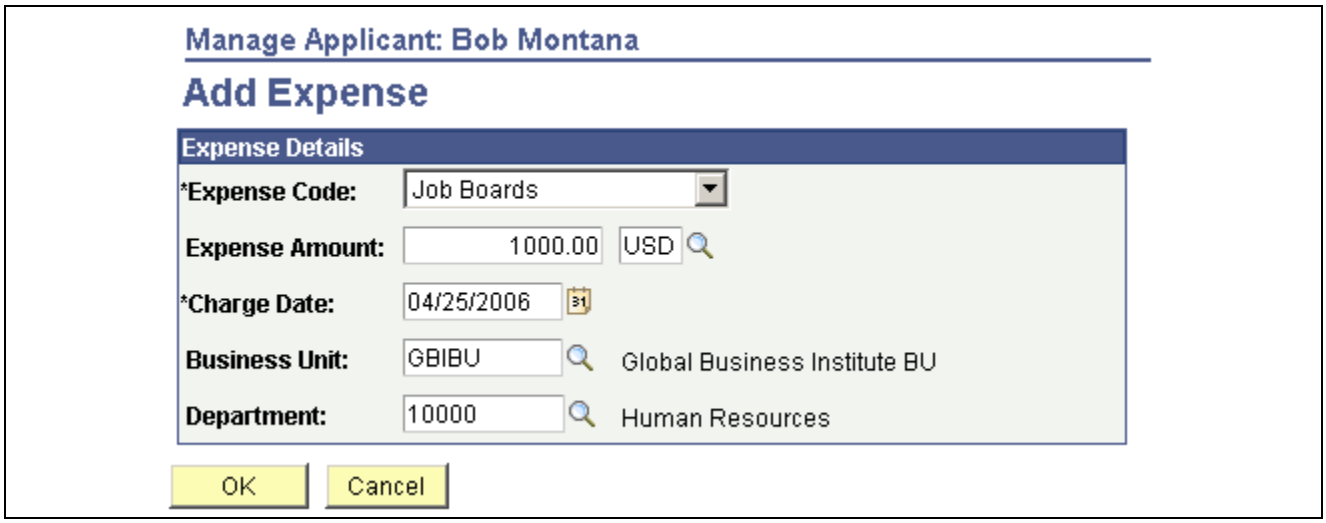
Expense Details Click to access the Add Expenses page, where you can edit expense details for the expense.

Add New Expense Click to access the Add Expenses page, where you can add expense details for a new expense.

Adding Applicant Expenses

Access the Add Expense page.

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Add Expense page

After you have set up the job opening and linked applicants to them, you can enter expenses at any time in the recruitment process

Expense Code	Select an expense code, such as airfare, car rental, travel, or parking.
Expense amount	Enter the expense amount and select a currency.
Charge Date	Enter the date on which the expense occurred.
Business Unit	Select a business unit to which the expense should be charged.
Department	Select a department to which the expense should be charged.

Managing Contact Notes

This section provides an overview of contact notes and attachments, lists a prerequisite, and discusses how to:

- Review contact notes and interested parties.
- Add contact notes.
- View proxy details.
- Add interested parties.

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.

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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 Recruiting Processes," Defining Contact Method Types, page 22.

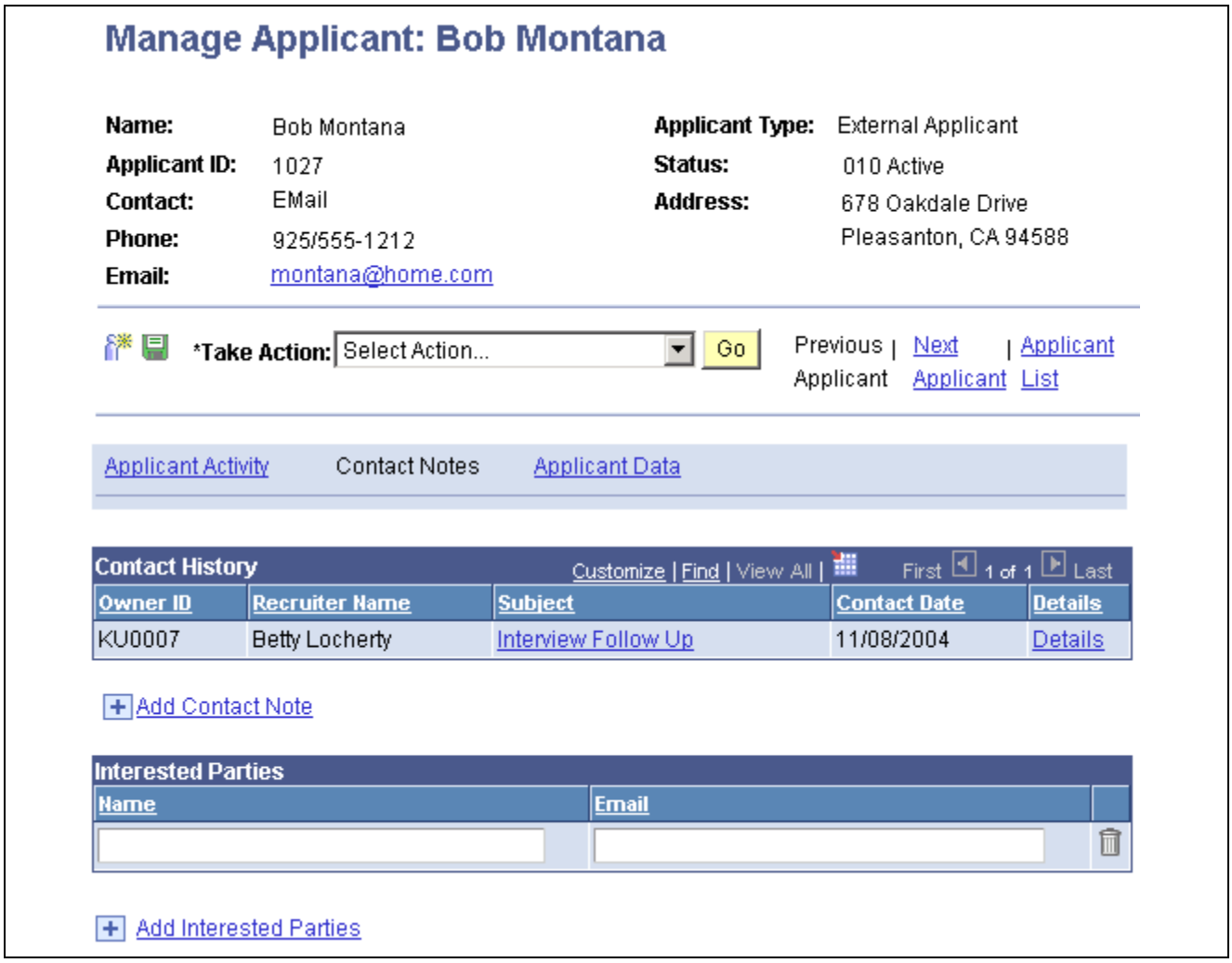
Page Used to Manage Contact Notes

Page Name	Object Name	Navigation	Usage
Find Applicants	HRS_REC_SCHAPP	Recruiting, Find Applicants, Find Applicants	Search for and select applicants.
Manage Applicant - Contact Notes	HRS_MANAGE_APP	Click an applicant name link in the Search Results grid on the Find Applicants page. Click the Contact Notes link on the Manage Applicant - Contact Notes - Current Activity page.	Review applicant data and perform various applicant related tasks.
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.

Reviewing Contact Notes and Interested Parties

Access the Manage Applicant - Contact Notes page.

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Manage Applicant - Contact Notes page

Contact History

Use this group box to view a summary of all contact notes entered for an applicant. Contact notes can be created by any individually generated letter. The system sorts the information in this group box by status date, with the most recent date at the top.

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.

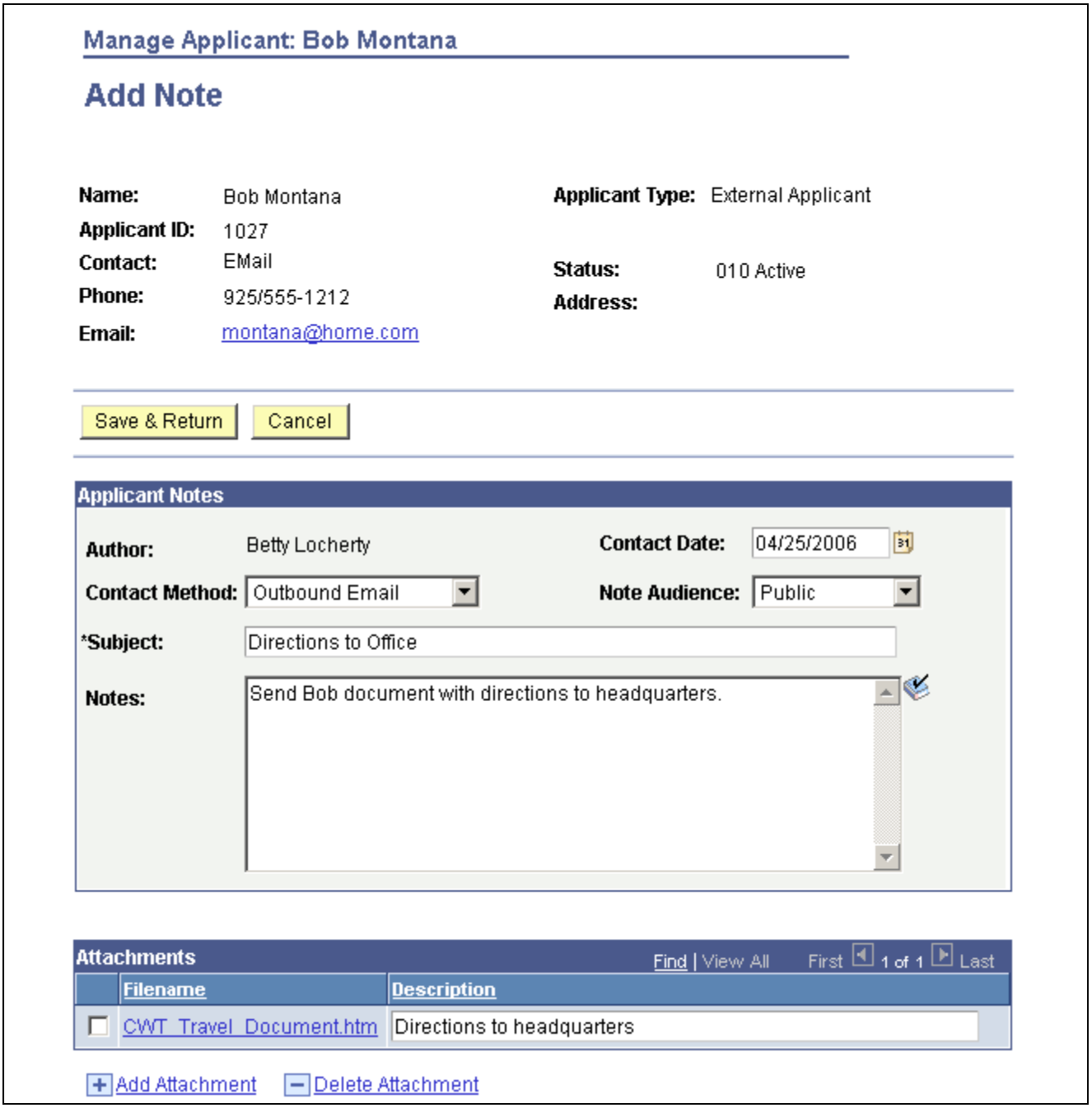
Interested Parties

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.

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Adding Contact Notes

Access the Add Note page.



Add Note page

Proxy Details This field displays if the applicant was submitted through a recruitment service. Click this link to display the Proxy Details page.

Email Click this link to send an email to the applicant.

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Applicant Notes

Contact Method Select a contact method.

Contact methods are defined on the Contact Method page.

Note Audience Select *Public, Private,* or *Interview*.

You can make contact notes public, private, or interview. 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.

Note. Interview notes will display on the Interview Schedule page.

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 the text of the note.

Attachments

Use this group box to add and delete attachments that pertain to the interactions that you had with the applicant.

To add an attachment:

1. Click the Add Attachment link.
2. In the browser window, search for the attachment to download.
3. Click the OK button.

To delete an attachment:

1. Select the check box next to the attachment you wish to delete.
2. Click the Delete Attachment link.

Click the Add Attachment link to display a browser window where you can search for the attachment to download. Select the

Viewing Proxy Details

Access the Proxy Details page.



Proxy Details page

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Reviewing Applicant Data

This section discusses how to review applicant data.

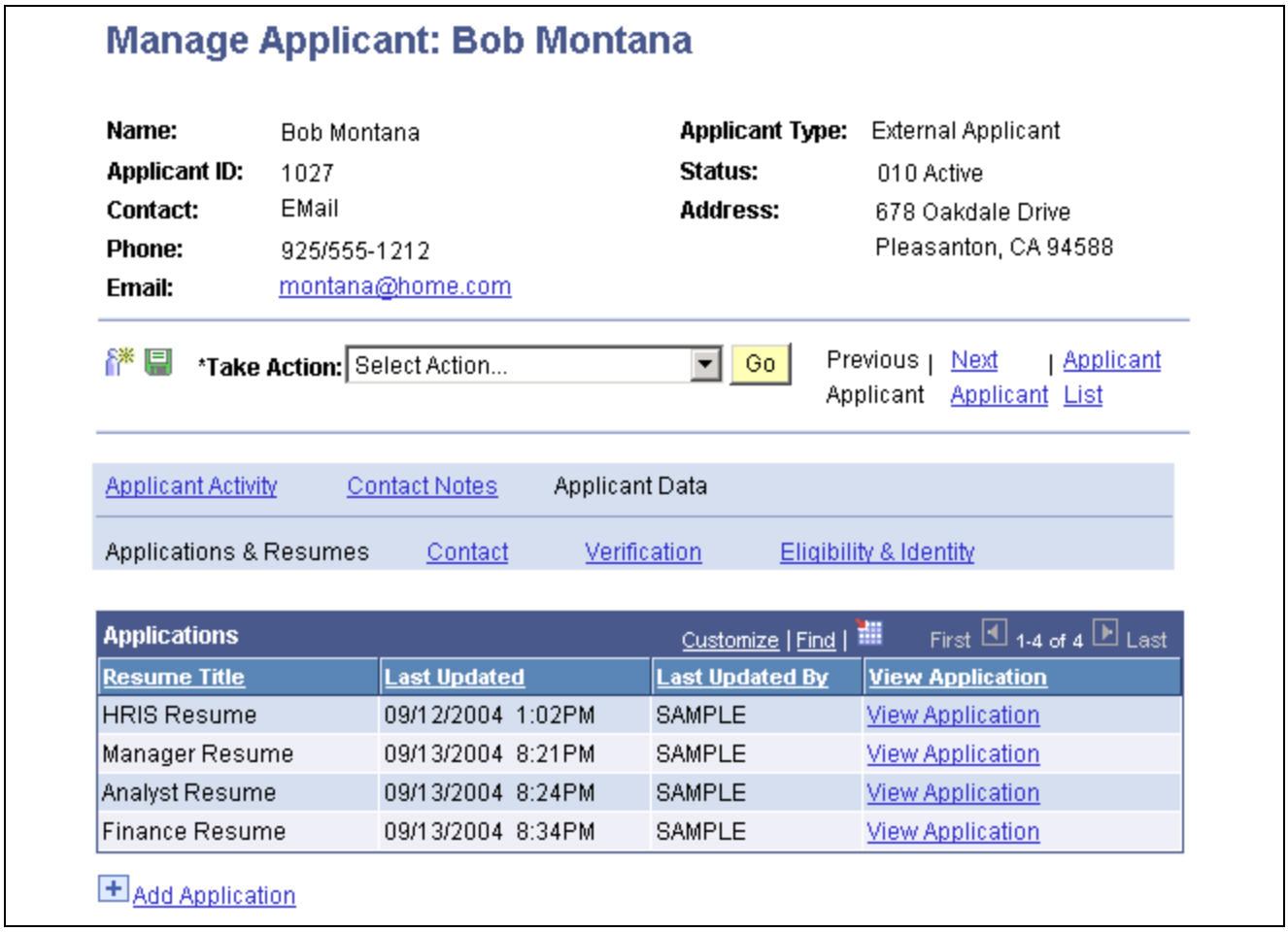
Pages Used to Review Applicant Data

Page Name	Object Name	Navigation	Usage
Find Applicants	HRS_REC_SCHAPP	Recruiting, Find Applicants, Find Applicants	Search for and select applicants.
Manage Applicant - Applicant Data - Applications & Resumes	HRS_MANAGE_APP	Click the name link in the Results group box on the Find Applicants page. Click the Applicant Data link and then the Applications & Resumes link on the Manage Applicant - Applicant Activity - Current Status page.	View an applicant's applications and add new applications.
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.

Viewing Applicant Data

Access the Manage Applicant - Applicant Data - Applications & Resumes page.

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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.

Editing applicant data is the same as adding applicants using the Add New Applicant component.

See Entering Applicants

Add Application Click to access the Manage Applicant - Application Details page, where you can add a new application for the applicant.

Managing Applicant Lists

This section provides an overview of applicant lists and discusses how to:

- View existing applicant lists.
- Create applicant lists.

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- 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.

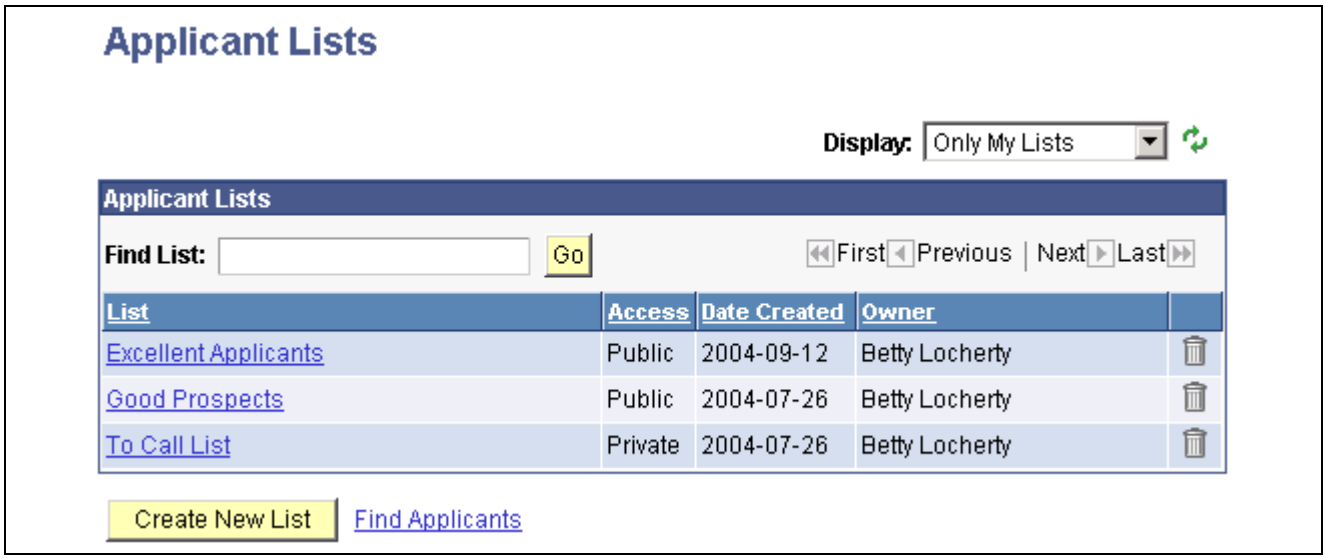
Pages Used to Manage Applicant Lists

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.

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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.

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Create New List page

Name Your New List

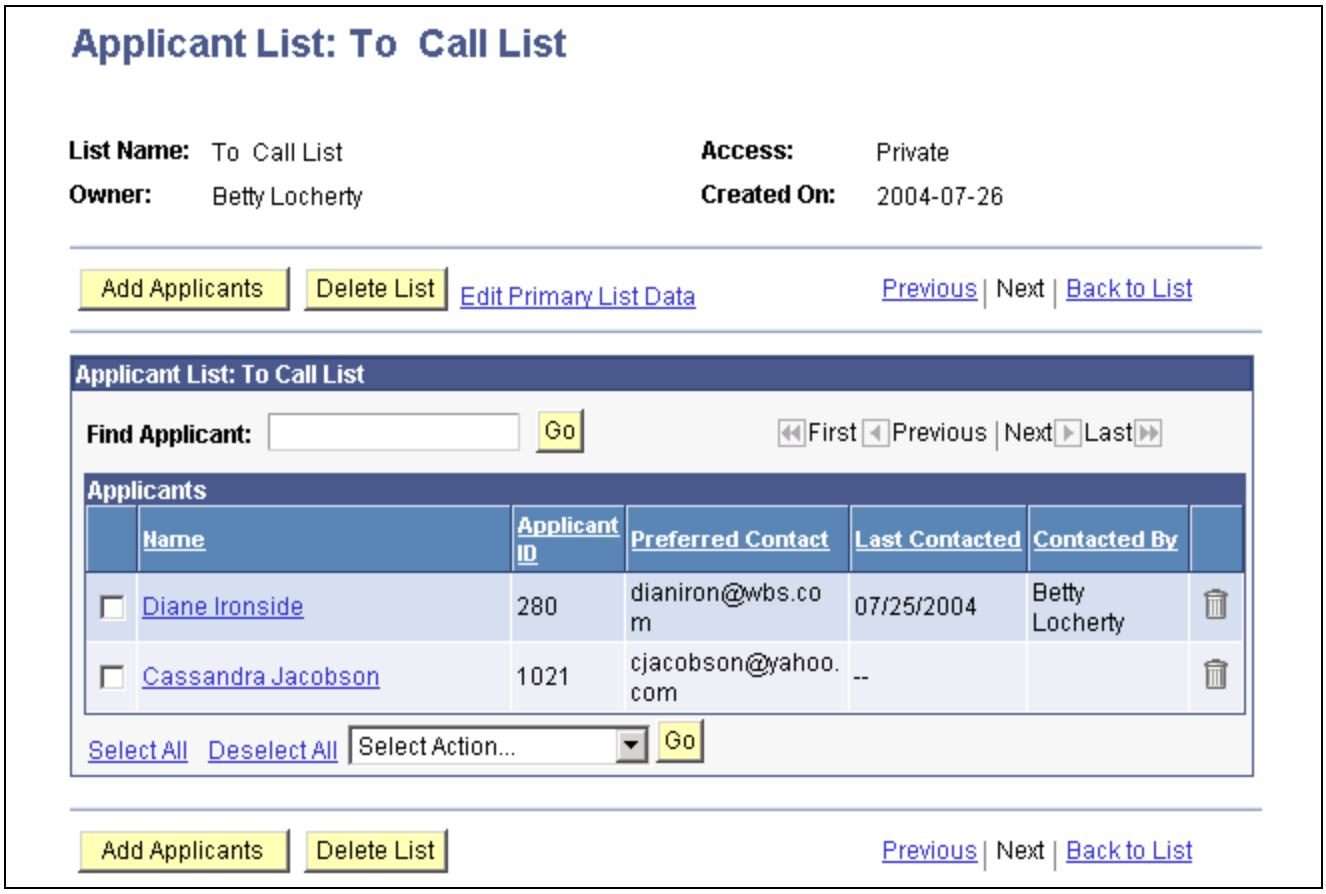
Active Select *Active* or *Inactive.* When a list is inactive, only the list owner can view the list. You cannot add applicants to inactive lists.

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.

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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

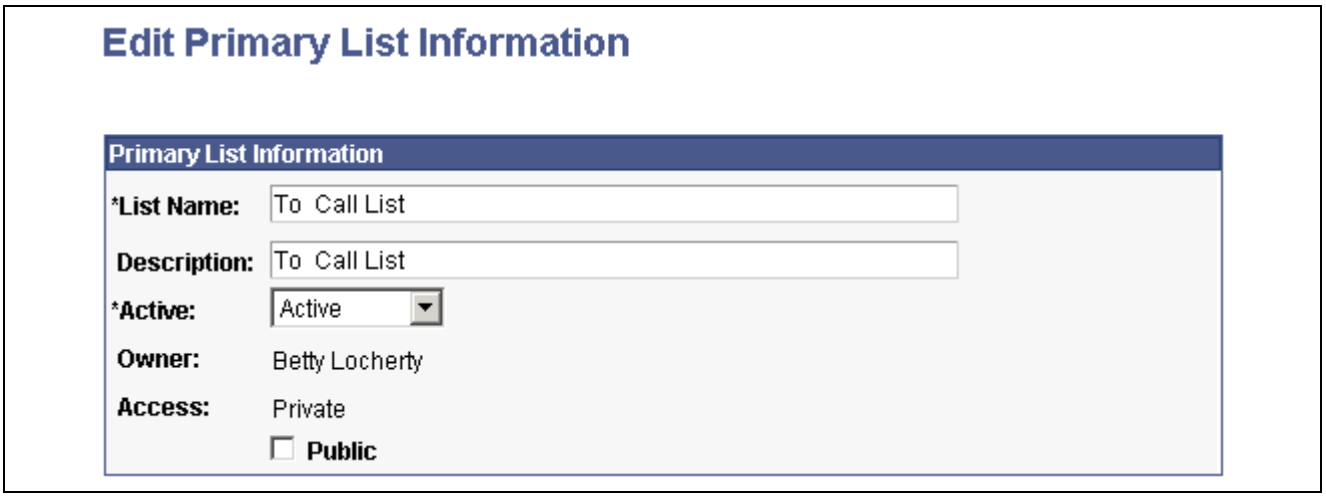
Applicants and **Go** Click an applicant's name link to access the Manage Applicant page for that applicant.

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.

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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.

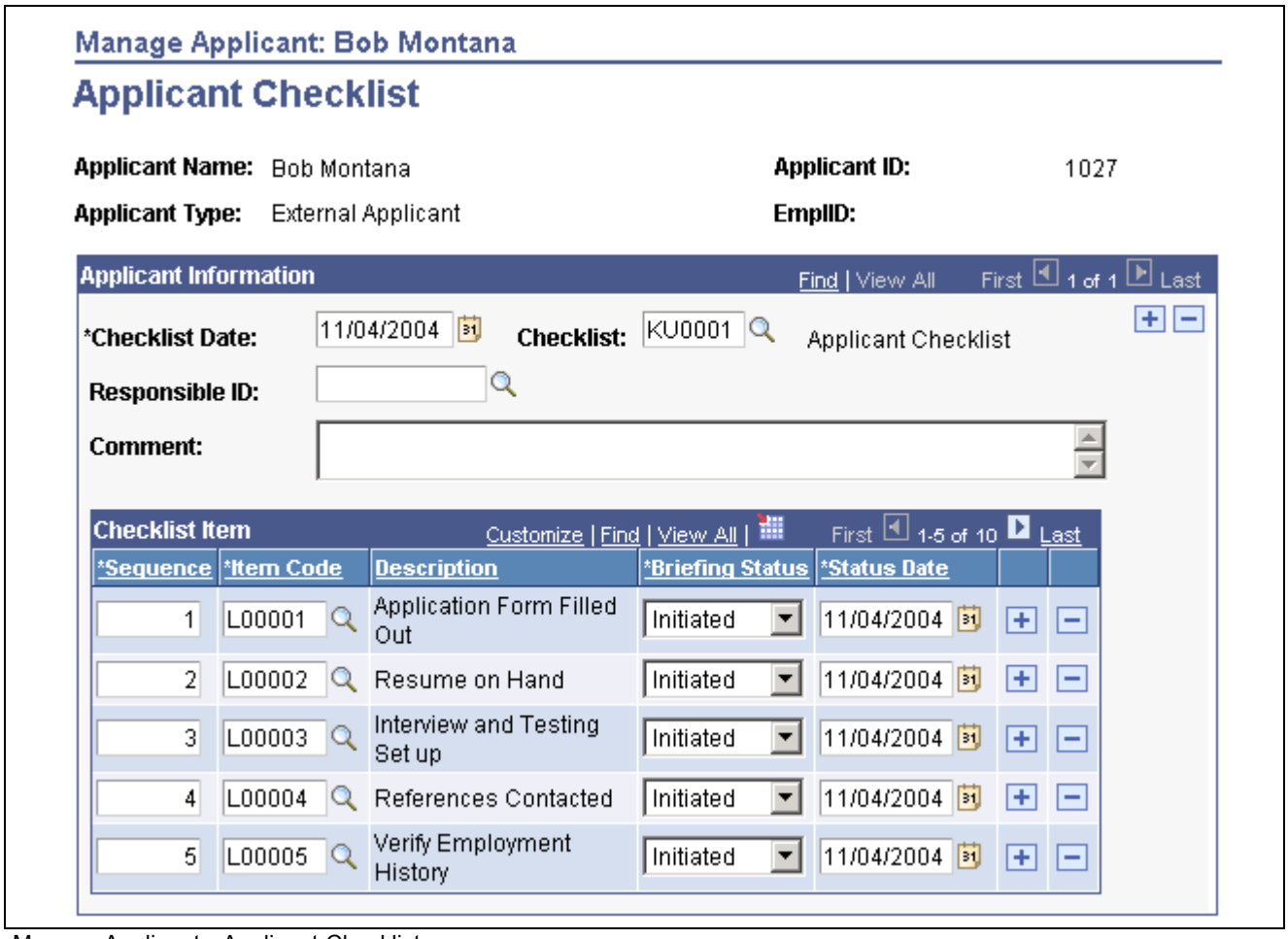
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Pages Used to Create Applicant Checklists

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 9.0 PeopleBook: Administer Workforce*, “Setting Up the Administer Workforce Business Process,” Creating Checklists.

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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.

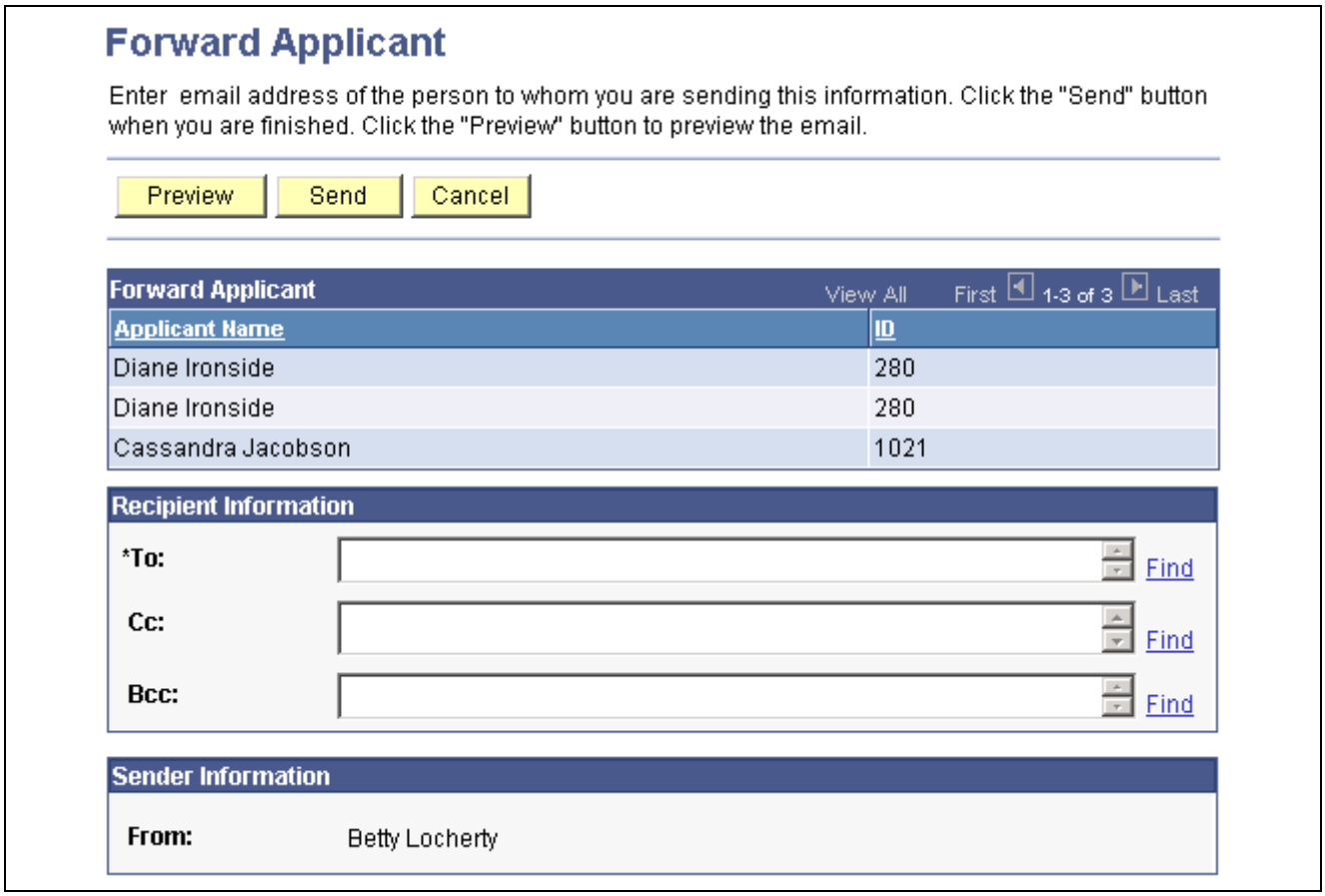
Pages Used to Forward Applicants

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.

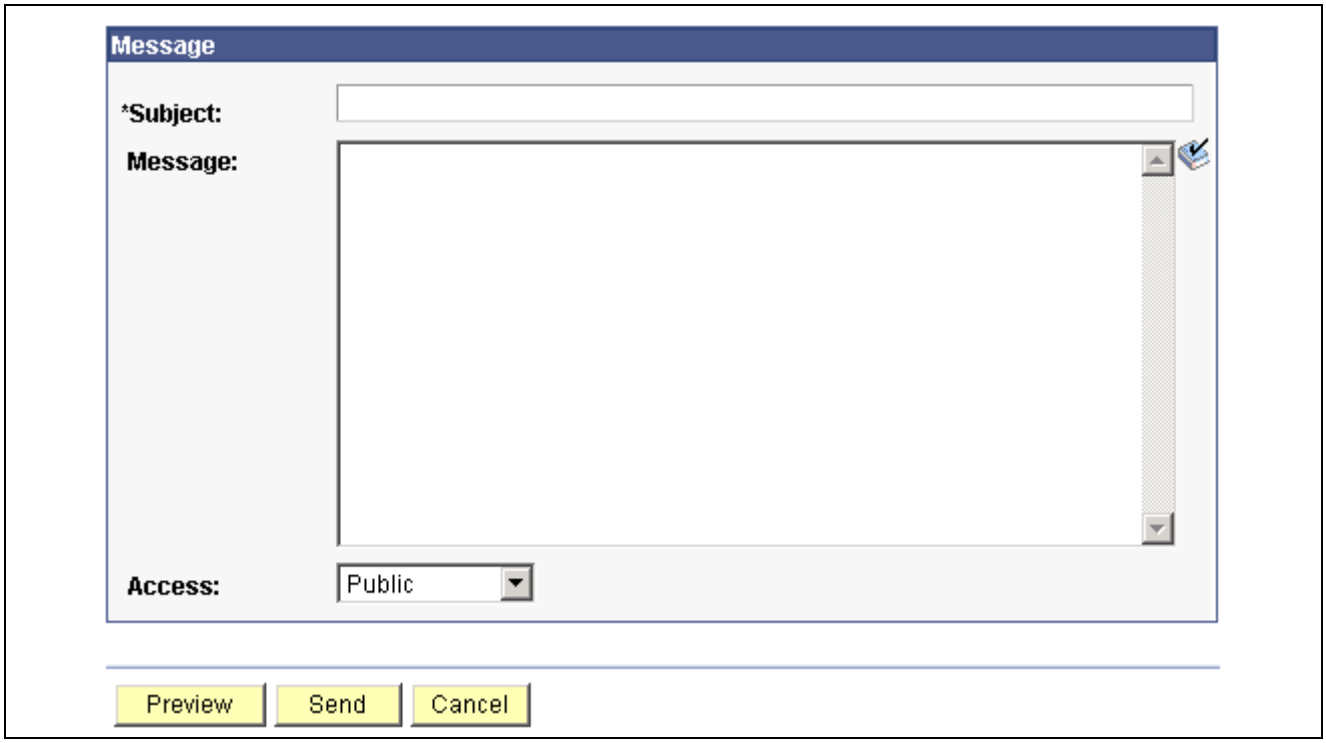
Forwarding Applicants

Access the Forward Applicant page.

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Forward Applicant page (1 of 2)



Forward Applicant page (2 of 2)

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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.

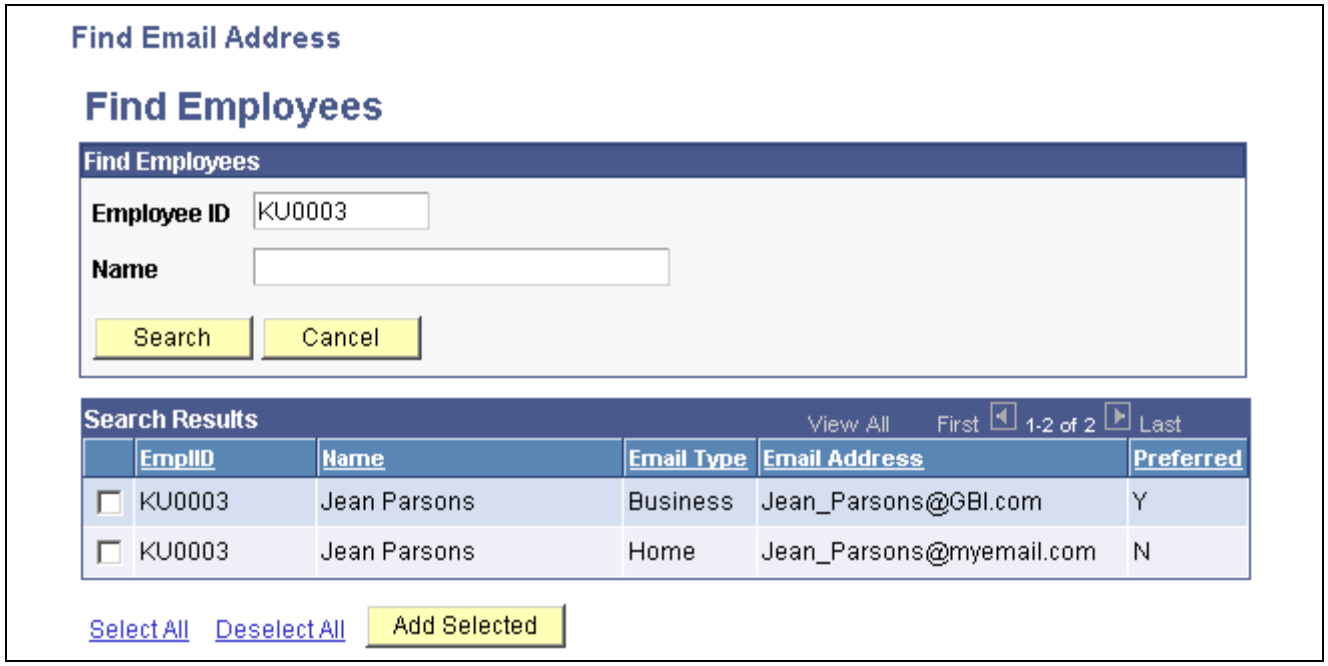
Message

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.

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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 Correspondences

This section provides an overview of the type of communication methods available and discusses how to:

- Send emails using Send Correspondence.
- Generate recruitment letters using XML Publisher.
- Generate batch recruitment letters.
- Send recruitment letters using email.

Understanding Communication Methods

Recruiting Solutions provides five methods for communicating with applicants.

- Emails sent through workflow.
- Emails sent using Send Correspondence.
- Recruitment letters generated online using XML Publisher.
- Recruitment letters generated in batch using XML Publisher.
- Recruitment letters sent using email.

Emails sent through workflow

Many of the tasks that you perform throughout the day are part of larger tasks that involve several steps and several people. For example, when you create a job opening, you are initiating an approval process, if approvals are active. A worklist item, email, or both are sent to someone to review and approve the job opening. An administrator may also need to review and approve the job opening before you can fill the position. Workflow enables you to automate the flow of information and communications to the appropriate people.

Emails sent through Send Correspondence

Send Correspondence is an action that enables you to send a message and attachments to an applicant's preferred email address.

The email can be designated as either Public or Private and may contain attachments. Anyone can view public messages. The user that sent the message or an administrator can view private messages. When you send the correspondence to an applicant, the system saves the message as a contact note where you can view it in the Contact History group box on the Manage Applicant - Contact Notes page.

Recruitment letters generated online using XML Publisher

Before letters can be sent using email, they must be generated and reviewed using Generate Letter. By clicking this link, the system generates opens the letter in the desktop application you defined for that file type. For example, Microsoft Word for RTF letters. You can immediately modify and print recruitment letters when:

- Applicants are entered into the system using the Add New Applicant component.

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- Existing applicants are previewed via the View Application component.
- Interviews are scheduled.
- Job offers are prepared.

When you print the letter, the system saves the letter as a contact note where you can view it in the Contact History group box on the Manage Applicant - Contact Notes page.

The system does not save the modified letter in the HRMS database. It saves the system-generated letter. To save the modified letter, you use the Upload Letter option to load your modified letter into the Recruiting system for safe storage.

Recruitment letters generated in batch using XML Publisher

Recruitment letters can be printed in a batch using the Generate Recruitment Letter (HRSLETTER) process. Letters are automatically added to a queue when you select a letter while completing anyone of the following tasks:

- Enter an applicant into the system using the Add New Applicant component.
- Applicant fails a screening level.
- Schedule an interview.
- Prepare a job offer.

Note. If you print an interview or offer letter using either Email Applicant or Generate Letter, the system removes the letter from the queue and considers the letter already printed. To track these letters, you can create a contact note using Manage Applicants.

Recruitment letters sent using email

Throughout Recruiting Solutions there are opportunities to generate and send predefined letters to applicants. Letters can be generated and optionally sent when:

- Applicants are entered into the system using the Add New Applicant component.
- Interviews are scheduled.
- Job offers are prepared.

When you select and generate a letter, you have the option Email Applicant. By clicking this link, the system displays the Send Correspondence page with the generated letter already attached. When you send the email, the system saves the letter as a contact note where you can view it in the Contact History group box on the Manage Applicant - Contact Notes page.

Note. Only interview and job offer letters can be emailed. Applicant letters do not have the Email Applicant option.

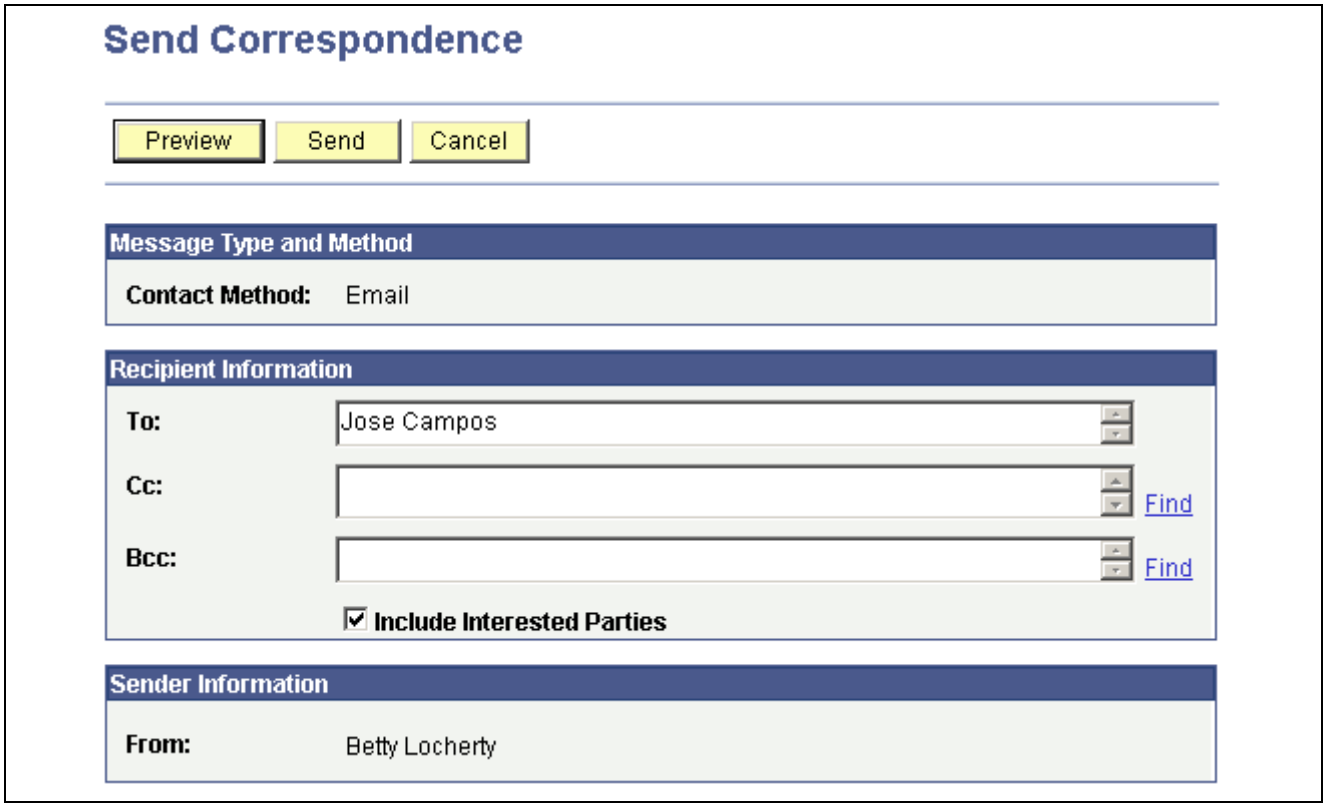
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Pages Used to Send Correspondences

Page Name	Object Name	Navigation	Usage
Send Correspondence	HRS_SEND_CRSP	Recruiting, Find Applicants Click the name link in the Search Results grid on the Find Applicants page. Select *Send Correspondence* in the Take Action field on the Manage Applicant - Applicant Activity - Current Status page.	Send emails to applicants.
Hrs Run Letters	HRS_RUN_LETTERS	Recruiting, Administration, Generate Recruitment Letters, Hrs Run Letters	Generate recruitment letters

Sending Emails

Access the Send Correspondence page.



Send Correspondence page (1 of 2)

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Send Correspondence page (2 of 2)

Preview Click to preview the email.

Send Click to send the email.

The system saves the contact note and it can be viewed in the Contact History group box on the Manage Applicant - Contact Notes page.

Recipient Information

Use this group box to enter the people that are to receive this email.

Message

Use this group box to enter the message and designate whether the message is Public or Private.

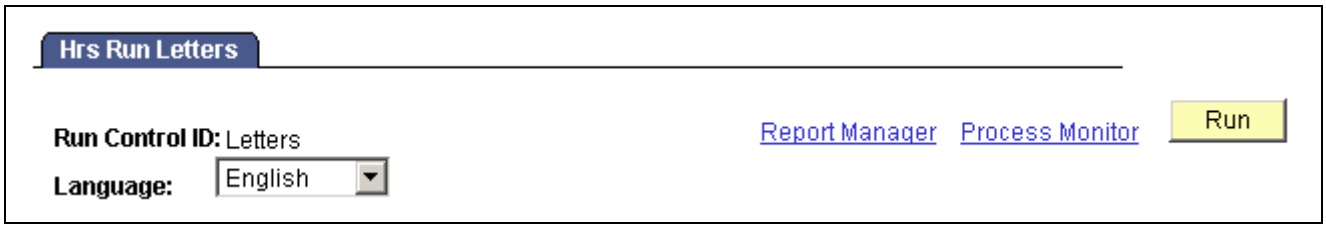
Attachments

This group box displays a list of attachment already connected to the email and provides a link for you to upload an attachment.

Generating Recruitment Letters

Access the Hrs Run Letters page.

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Hrs Run Letters page

Click the Run button to run the HRS Letter Generation process (HRSLETTER) using PeopleSoft Process Scheduler.

Note. If you select Printer in the Type field on the Process Scheduler Request page, you must enter the URL address for your printer in the Output Destination field.

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 6, “Creating Job Openings,” Creating Job Openings, page 124.

- Enter applicants.

  See Chapter 7, “Entering Applicants,” page 163.

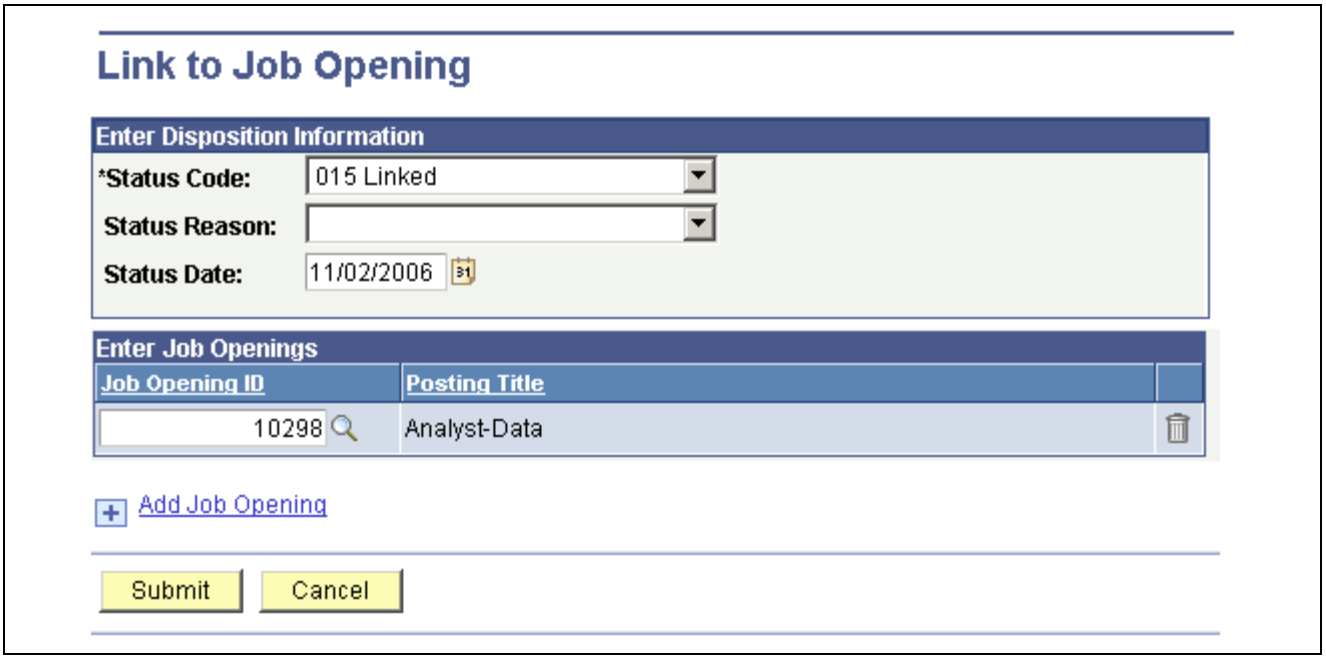
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Pages Used to Link Applicants to Job Openings

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	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 page.



Link to 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 9.0 Application Fundamentals PeopleBook*, "Setting Up and Administering HRMS Security," Activating Additional Security for Recruiting Solutions.

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Changing Applicant Statuses

This section discusses how to change applicant statuses.

See Also

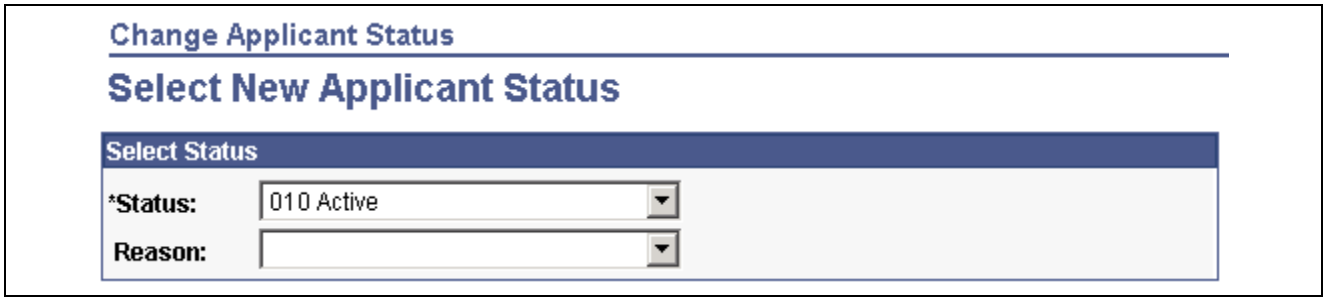
Chapter 4, "Setting Up Recruiting Statuses," page 65

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 9.0 Application Fundamentals PeopleBook, "Setting Up and Working with Search/Match"

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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 7, "Entering Applicants," Adding Application Information, page 169.

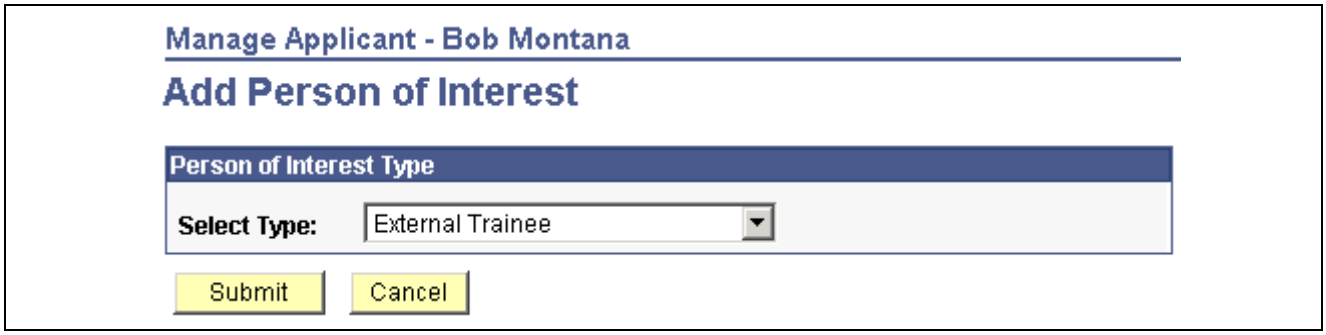
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Pages Used to Add Persons of Interest

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 9.0 Application Fundamentals PeopleBook*, "Setting Up Organization Foundation Tables," Setting Up Person of Interest Types.

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Viewing Search/Match Results

Access the Search Results page.

See Chapter 11, "Hiring Applicants," Reviewing Search/Match Results, page 257.

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. Access the Process Duplicate Applicants component.
2. Click the Create New Search button to define search criteria on the Find Duplicate Applicants page.
3. Select the search criteria and click the Run button. This initiates 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.
4. Click the View Details button on the Process Duplicate Applicants page to review the results 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.
5. Use the Manage Applicant component to determine whether the applicants identified in the results can be merged into one record.

   Identify which applicant ID you want to keep. This is the *target* ID.

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Identify which applicant IDs you want to merge with the target ID. This is the *source* ID.

6. You can merge the applicant records two ways:
   - Using the Process Duplicate Applicants component to run the Duplicate Applicant Merge Application Engine process (HRS_DUPE_MRG).
   - Using the *Merge as Target* action from the Manage Applicant component.

     Note. Merge as Target also uses the Duplicate Applicant Merge Application Engine process (HRS_DUPE_MRG).

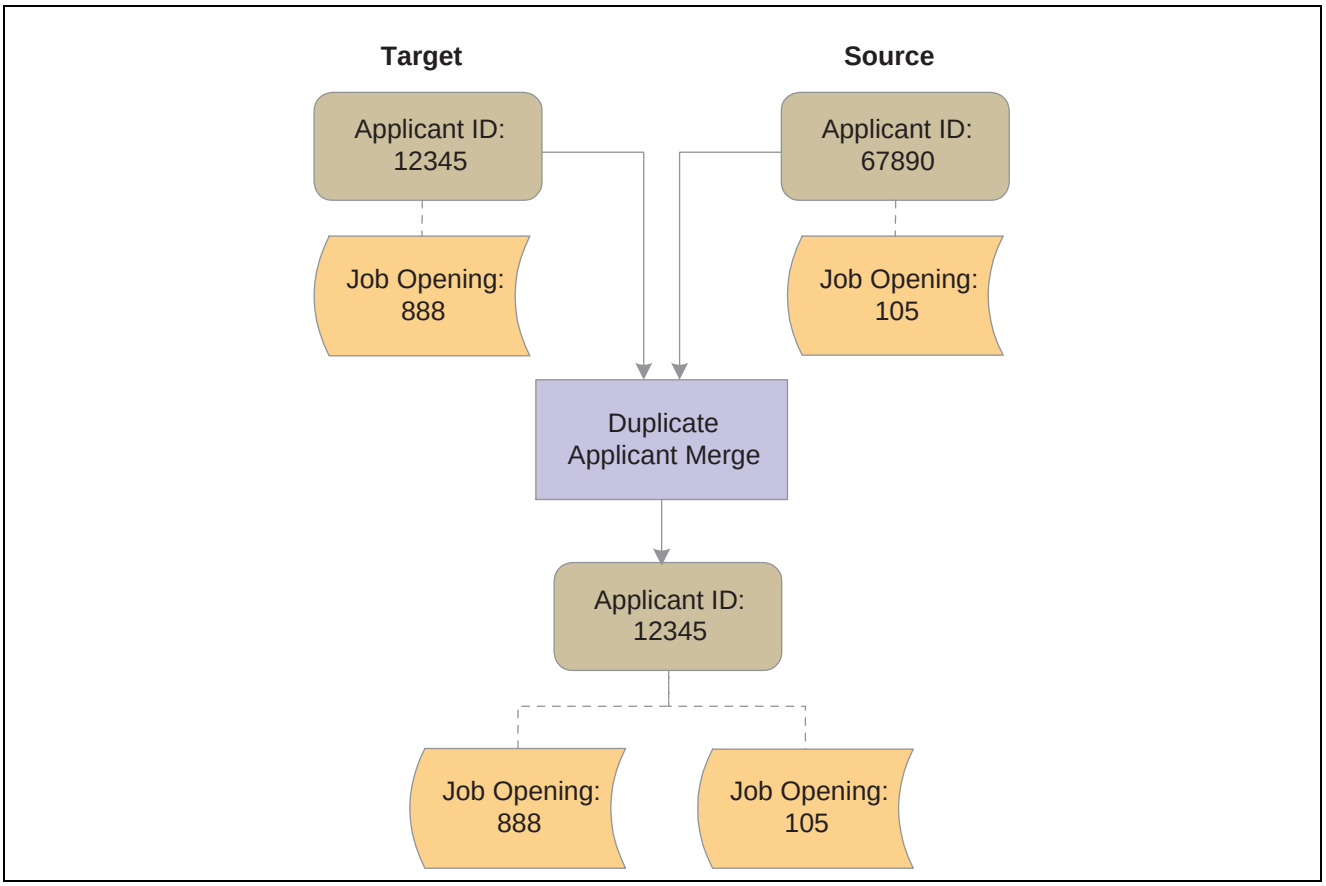
This process merges the source applicant records into the target applicant record. This process also sets the source applicant records to Inactive. The system updates the target record with the most current contact information (first name, middle name, last name, address, phone numbers, email addresses) 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:

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Duplicate Applicant Merge process

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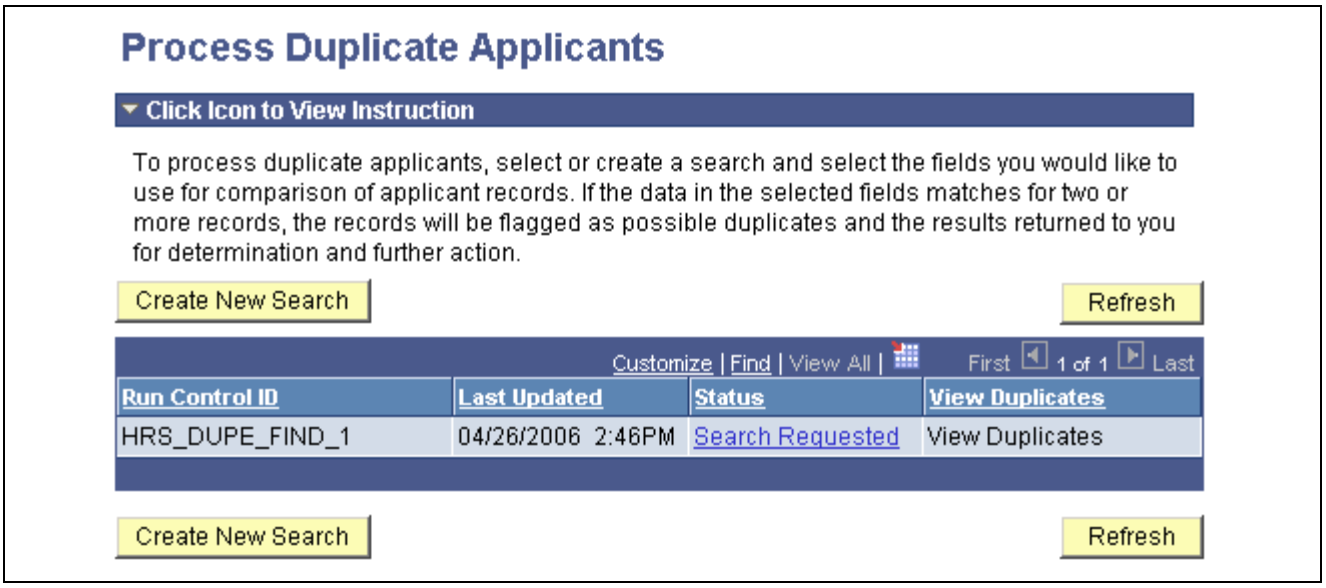
Pages Used to Process Duplicate Applicants

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.
Merge As Target	HRS_APP_MERGE	Recruiting, Find Applicant Click the applicant name link in the Search Result group box on the Find Applicant page. Select *Merge As Target* in the Take Action field on the Manage Applicant - Applicant Activity - Current Status page.	Merge duplicate applicant records.
Merge As Source	HRS_APP_MERGE	Recruiting, Find Applicant Click the applicant name link in the Search Result group box on the Find Applicant page. Select *Merge As Source* in the Take Action field on the Manage Applicant - Applicant Activity - Current Status page.	Merge duplicate applicant records.

Initiating Duplicate Applicant Process

Access the Process Duplicate Applicants page.

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Process Duplicate Applicants page

Create New Search Click this button to access the Find Duplicate Applicants page, where you can select new duplicate applicant search criteria and run the Find Applicant Duplicates process.

Refresh Click to refresh the status links with the current status of the process.

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.

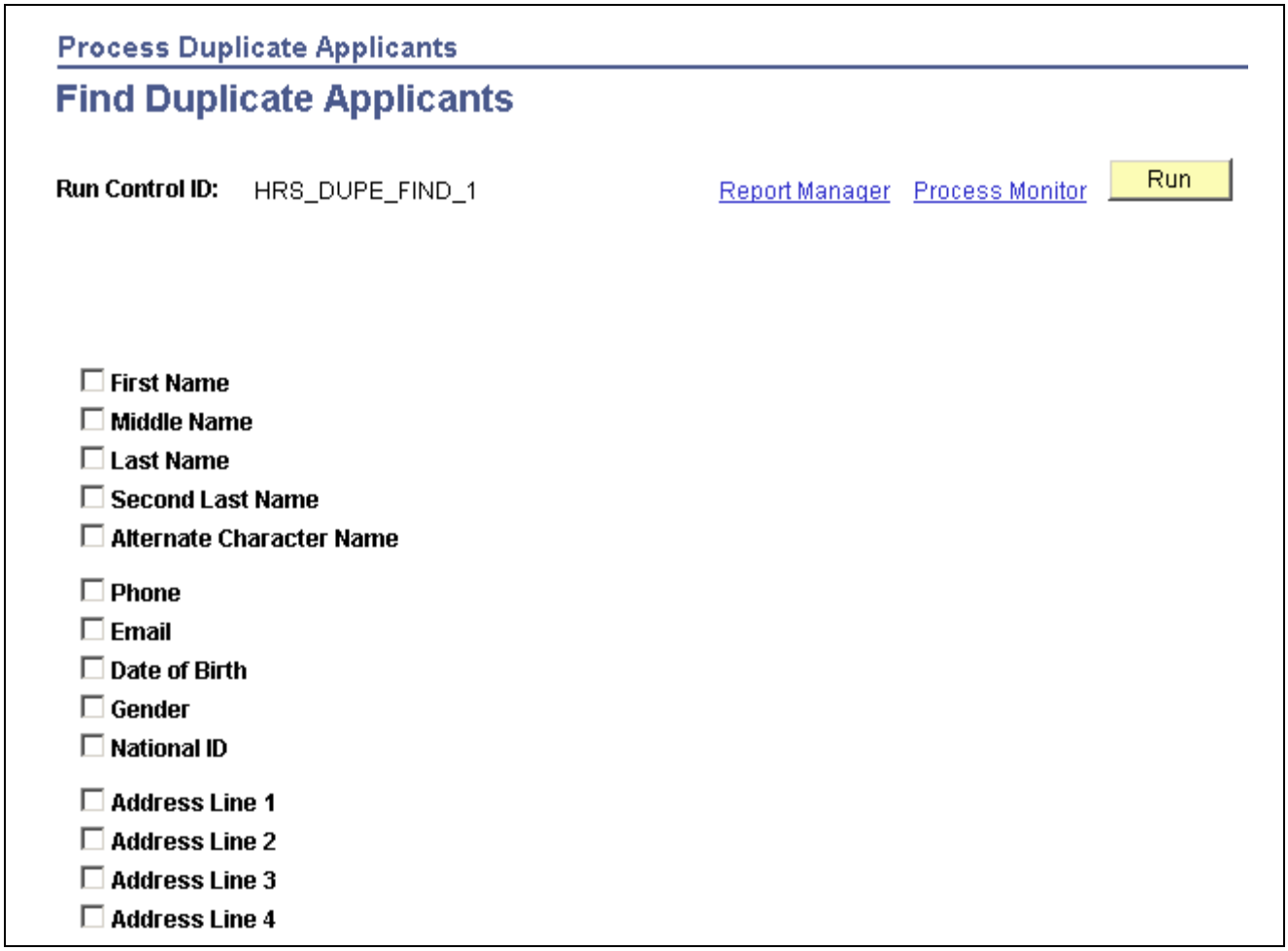
Search Requested: Indicates that the Find Applicant Duplicates process is initiated.

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.

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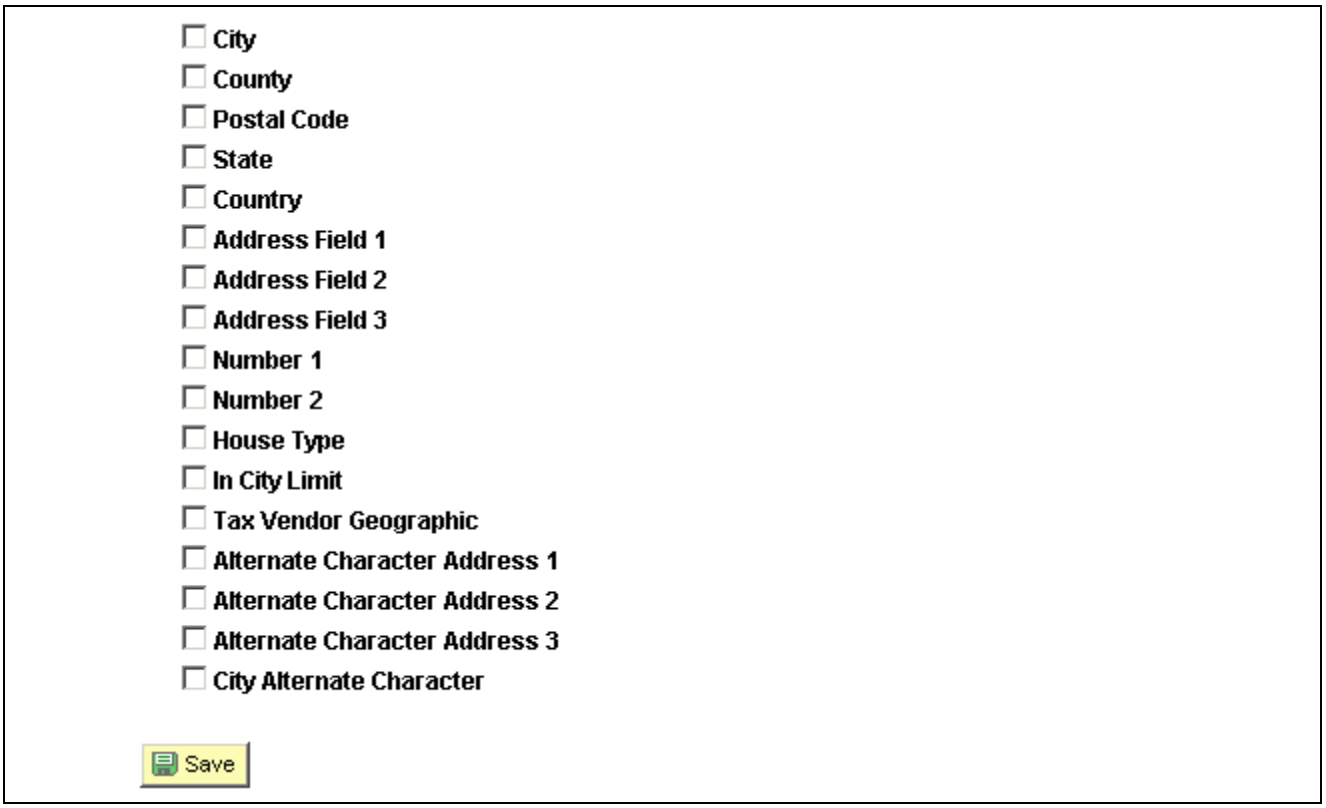
Defining Search Criteria

Access the Find Duplicate Applicants page.



Find Duplicate Applicants page (1 of 2)

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Find Duplicate Applicants (2 of 2)

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.

Click the Run button to run this request. PeopleSoft Process Scheduler runs the Find Applicant Duplicates process at user-defined intervals.

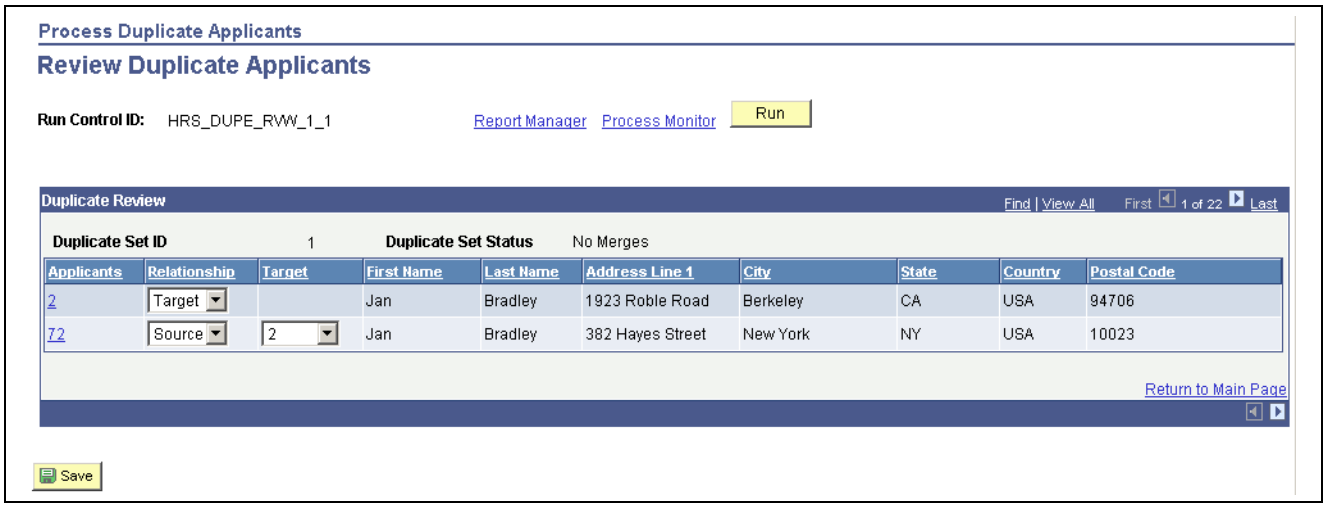
See Also

Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications

Merging Duplicate Applicant Records

Access the Review Duplicate Applicants page.

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Review Duplicate Applicants page

Click the Run button 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.

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See Also

Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications

Merging Applicants

Access the Merge As Target page.



Merge As Target page

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Merge as Source page

If you did not merge duplicate applicants using the Review Duplicate Applicants page, you can use this page to do so. You will need to know the applicant ID for the record that you want to merge into the current ID.

Click the Search icon to find the ID and click the Merge button.

Generating Recruitment Related Reports

This section discusses how to generate:

- Candidate Listing reports.
- Applicant Summary by Job reports.
- Applicant Summary by Source reports.
- Job Group Movement Analysis reports.

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Pages Used to Generate Recruitment Related Reports

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.
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.
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).
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.

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CHAPTER 15

Managing Resumes

This chapter provides an overview of resume management and discusses how to:

- Load resumes.
- Manage resumes.

Understanding Resume Management

This section discusses:

- Channels.
- Resume extraction process.
- Resume statuses.

Channels

Applicant resumes can come into the Recruiting Solutions system from one of these channels:

- Email.
- Resume Load Process Application Engine process (HRS_RESLOAD).
- Job boards and service providers.
- Apply online.
- Add New Applicant (HRS_ADD_APPLICANT) component.

Resume Management supports all resume document formats and will accept HR-XML resumes from all channels. However, only OIF uses the data within the HR-XML document to directly write data to Recruiting Solutions tables. The other processes route the document to a resume extractor for processing. Not all resume extractors support all resume document formats. If the resume extractor doesn't support the resume document format, the resume extraction process fails.

Email

Applicants and staffing suppliers can email resumes to a designated email address that you set up.

See Chapter 5, "Setting Up Third Party Integrations," Setting Up Resume Email Accounts, page 114.

Resume Load Process Application Engine Process (HRS_RESLOAD)

The Resume Load Process enables organizations to load resumes that it receives.

See Chapter 15, "Managing Resumes," Loading Resumes, page 346.

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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 88.

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 103.

Apply Online

Internal and external applicants can use PeopleSoft Enterprise Candidate Gateway to apply for job openings online.

See *PeopleSoft Enterprise Candidate Gateway 9.0 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 7, "Entering Applicants," page 163.

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Understanding the Resume Extraction Process

Resume extractors extract data from applicant resumes and move the data into Recruiting Solutions tables. Organizations can use multiple resume extractors. For example, you can use a different resume extractor for each country in the organization, or you can use different resume extractors for each recruitment source from which you receive resumes.

The resume extractor that the system selects to use depends on the resume extractor that you specify for a recruitment source, a site, or the extractor that you specify when you run the Resume Load Process or run an extraction from the Manage Resumes (HRS_AL_LOG) component. If an applicant attaches their resume to their online application in Candidate Gateway, the system uses the resume extractor that is specified on the Site - Setup Site page for that online application site. If the resume comes from a specific recruitment source; for example, a recruiting agency, the system uses the resume extractor that you specified in the Source Setup component when you set up the recruitment source. When you load resumes by using the Resume Load Process, you select which extractor to use when you run the process.

Resume extractors extract data from an applicant's resume. Not all extractors extract the same data. PeopleSoft software supports the following data from the extractors:

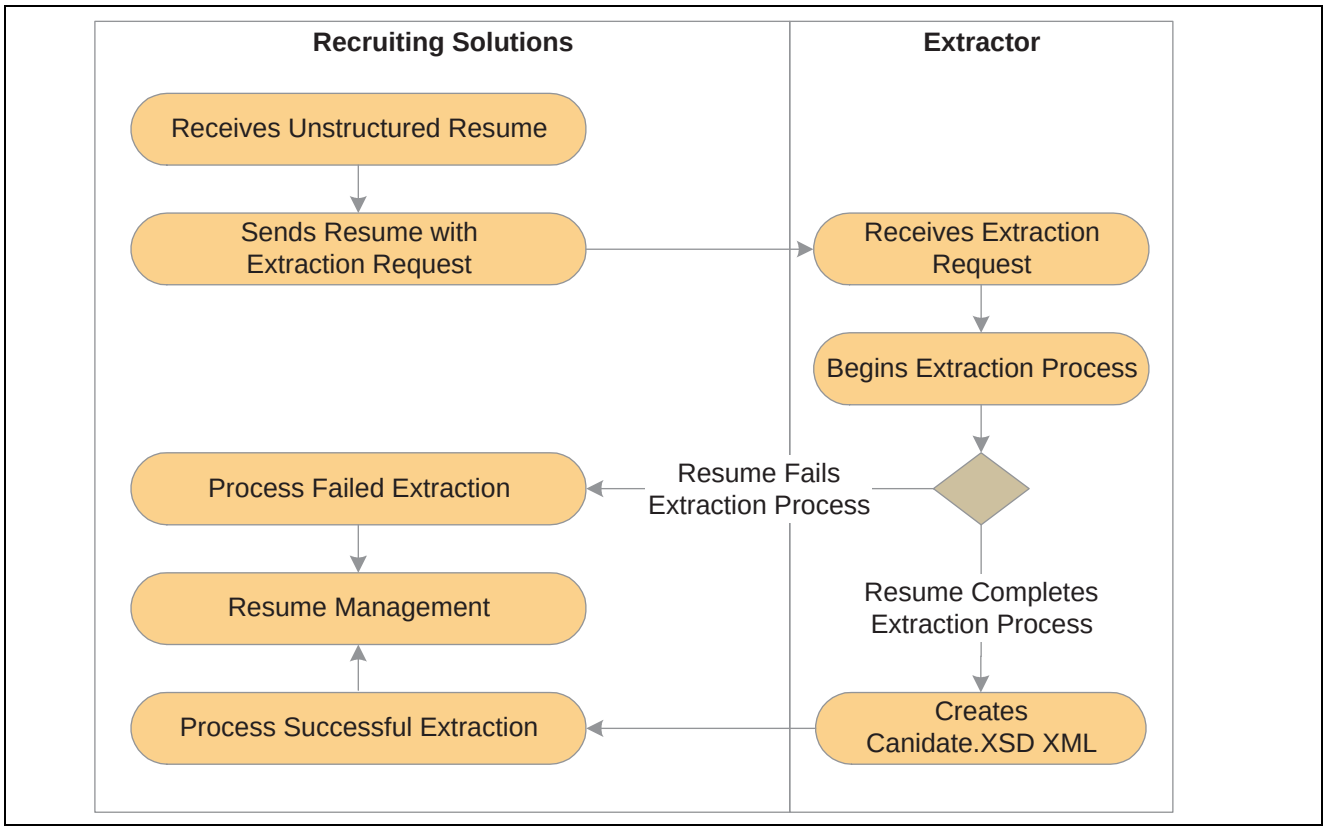
- Contact information: applicant name, home address, telephone numbers, and email address.
- Prior work experience.
- Secondary education.
- Qualifications including licenses and certificates, languages, memberships, honors and awards, and competencies.
- Referrals.
- Full resume text.

Upon successful extraction, the system creates a record for the applicant in the Manage Applicant component, and populates fields in the Manage Applicant component for the applicant. The system also assigns the applicant an applicant ID, a status, a resume name, adds the original resume as an attachment, and associates any job openings that might be applicable. If the applicant attaches a resume when they apply online through Candidate Gateway, the resume extractor populates fields in the applicant's online application and referrals. Of course, this presumes that the extractor actually extracted this data.

Note. The resume extraction process isn't required for applicants to apply for job openings online by using Candidate Gateway.

This process flow shows the resume extraction process:

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Resume extraction process

Understanding Resume Statuses

The system assigns a status, or resolution state, to each resume that it receives. For resumes from recruitment sources that are a Vendor type, the system uses the settings that you define on the Vendor page in the Source Setup component to determine which status to assign to the resume. For the Resume Load Process, the system uses the run parameters that you set up to determine what statuses to assign.

The resume status of a resume is different than the extraction status of the resume. The extraction status of a resume can be either Success or Fail. In general, a resume that fails an extraction process is automatically set to either a Rejected or Unresolved resume status, and resumes that are successfully extracted are set to either a Success or Draft resume status, depending on the business rules that you set up for the recruitment source or the parameters that you select when you run the Resume Load Process.

When the system receives a resume through OIF, the resume extraction process might not be involved. However, the resume status is still applicable. For example, if the system receives a Candidate-XML message directly from a recruiting agency through OIF that is already parsed (extracted), the system does not send it to a resume extractor. However, the system does run the resume through the autoscreening rules that an organization sets up for the recruitment source.

This table describes resume statuses:

Resume Status	Description	Default Applicant Status
Awaiting Resolution	Indicates that the resume is in the database but has not yet been processed through a resume extractor.	Not applicable. Applicant data is not created until the resume is extracted.

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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

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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 110.

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.

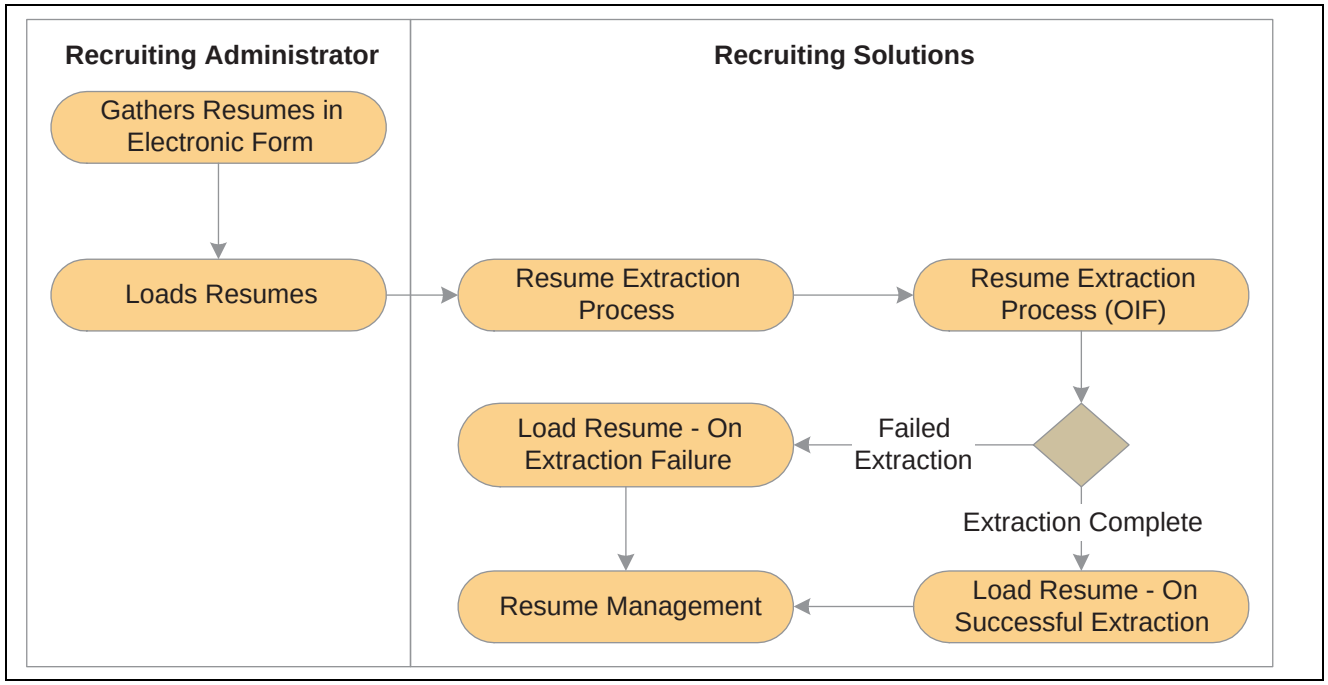
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When you set up the process you can specify the resume extractor that you want the system to use, parameters for the resume extractor, the site ID to which you want to redirect applicants, the source to which you want to associate resumes, the statuses 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 15, "Managing Resumes," Managing Resumes, page 351.

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 Chapter 2, "Setting Up Recruiting Processes," Setting Up Sites, page 12.

- 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 103.

- Create job openings if you want to associate applicants with a job opening.

  See Chapter 6, "Creating Job Openings," Creating Job Openings, page 124.

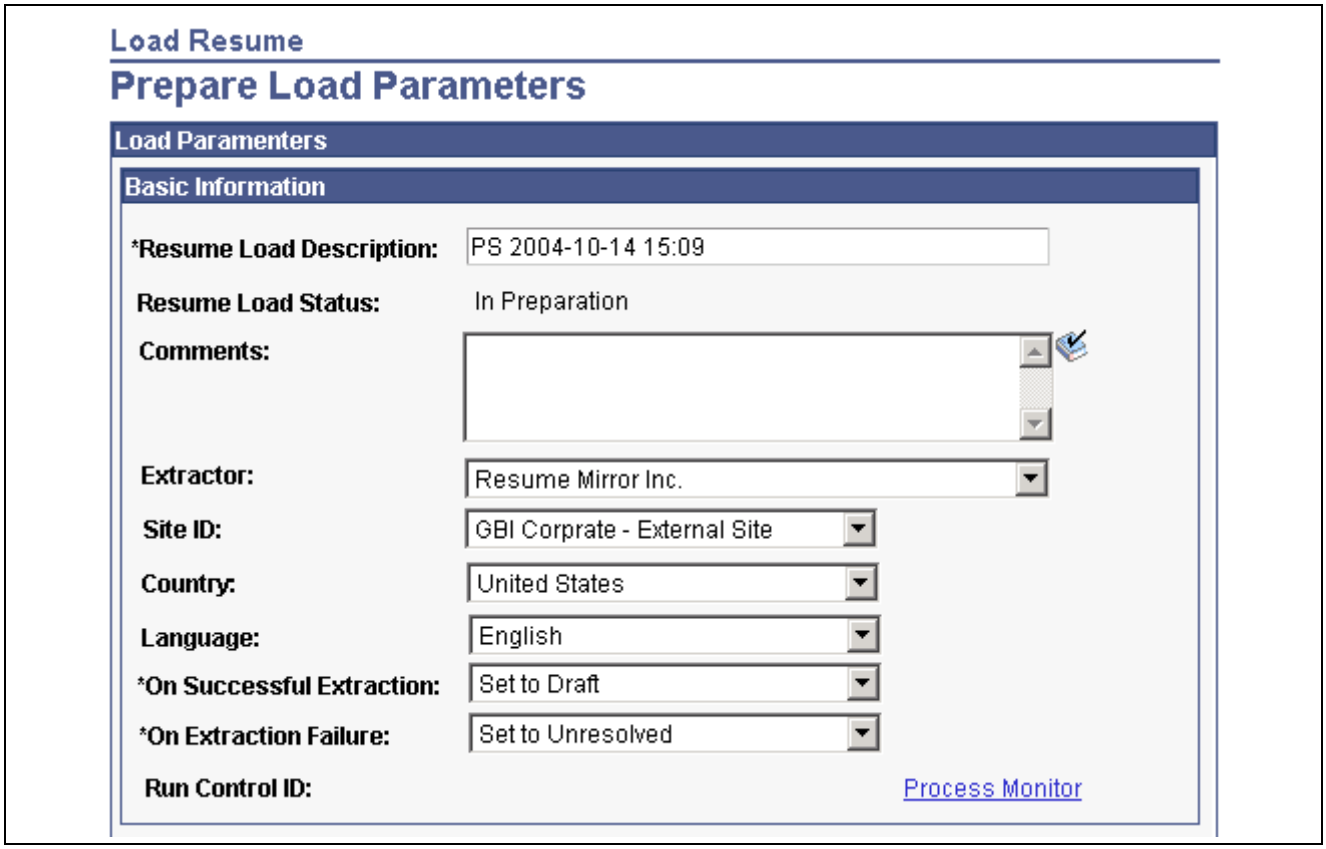
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Page Used to Load Resumes

Page Name	Object Name	Navigation	Usage
Load Resume - Prepare Load Parameters	HRS_RESLOAD	Recruiting, Administration, Load Resume, Load Resume - Prepare Load Parameters	Load resumes.

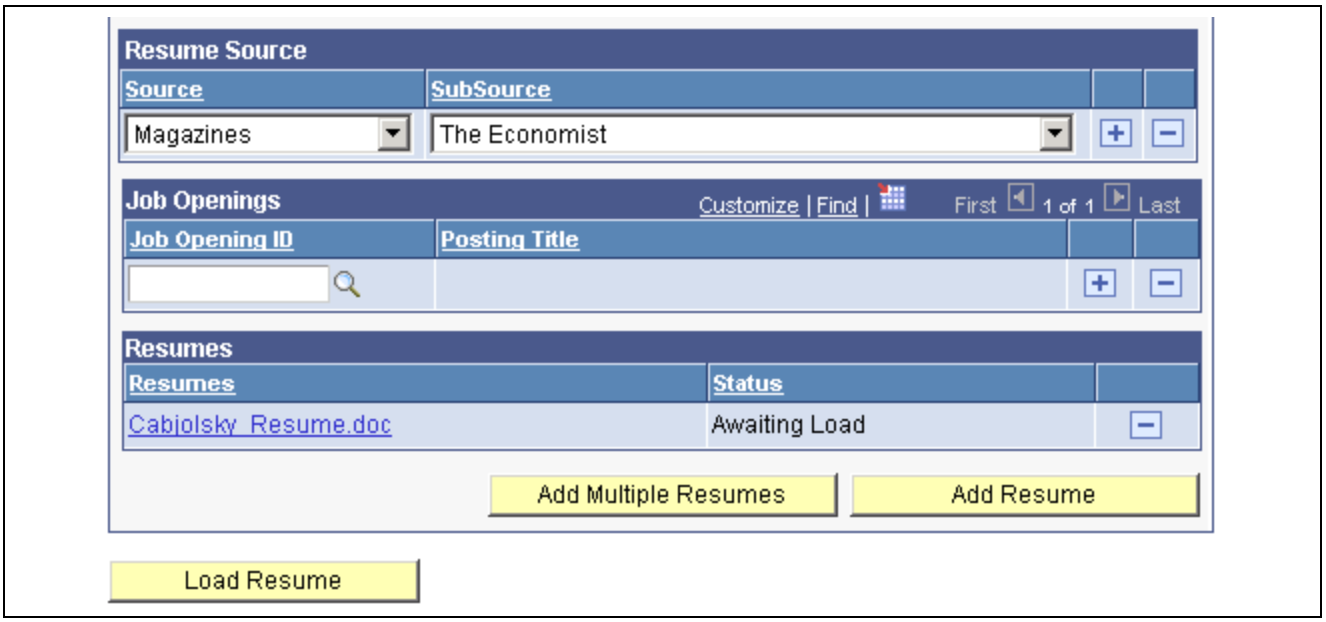
Loading Resumes

Access the Load Resume - Prepare Load Parameters page.



Load Resume - Prepare Load Parameters page (1 of 2)

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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.

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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

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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 15, “Managing Resumes,” Understanding Resume Management, page 341.

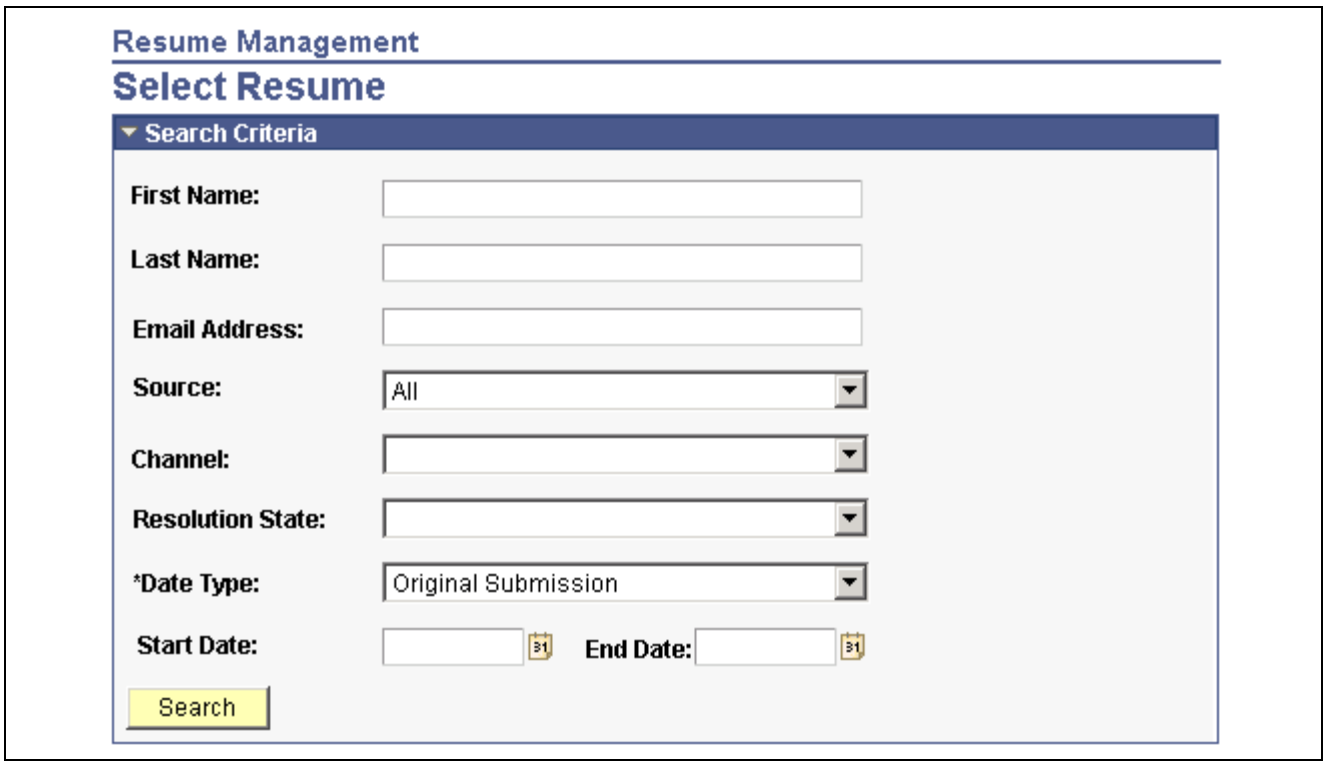
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Pages Used to Manage Resumes

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.

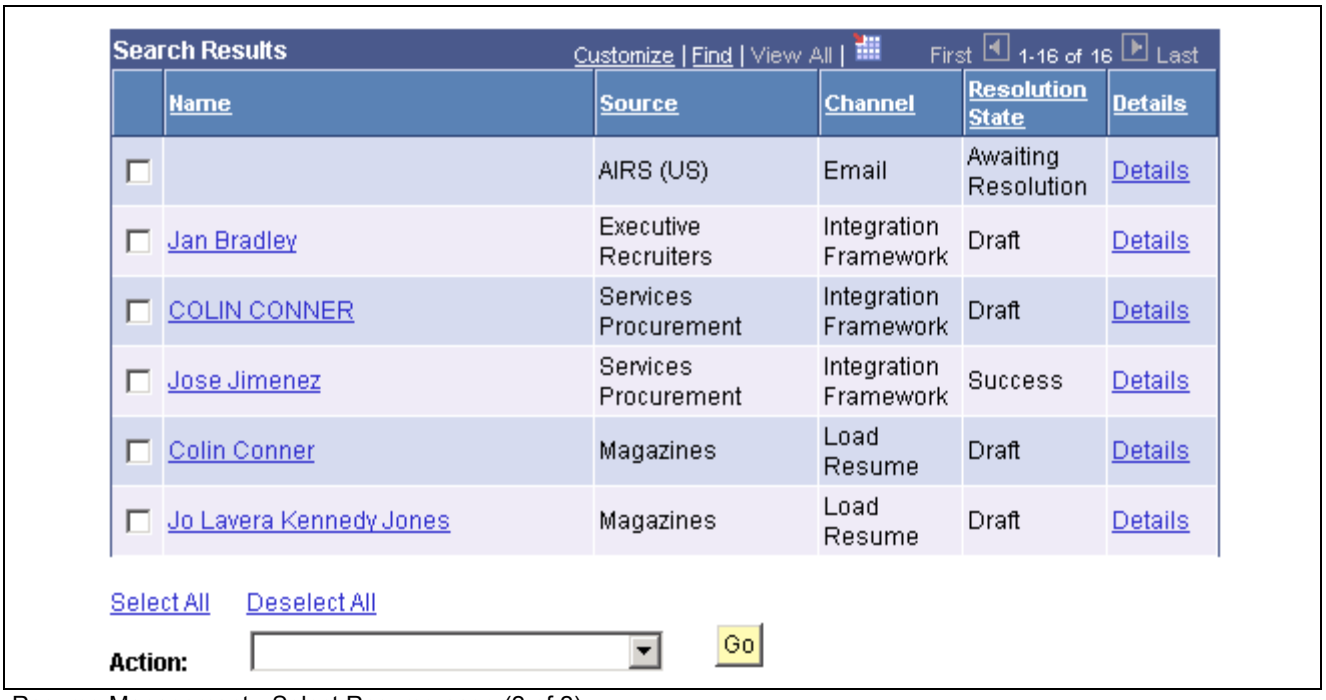
Managing Resumes

Access the Resume Management - Select Resume page.



Resume Management - Select Resume page (1 of 2)

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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:

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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.

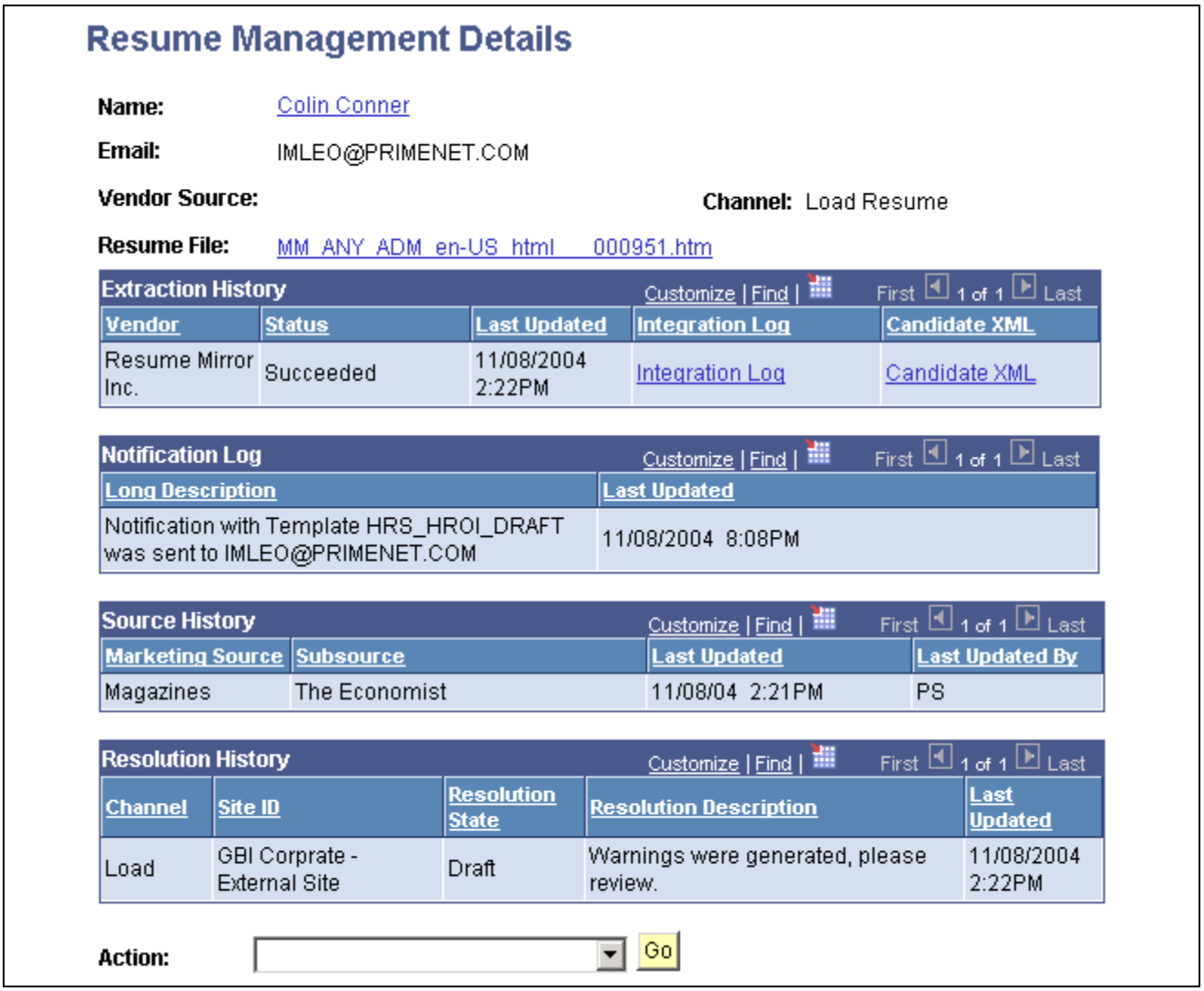
Send Notifications: The system sends a notification (HRS_HROI_DRAFT, HRS_HROI_REJECT, HRS_HROI_SUCCESS, or HRS_HROI_UNRESOLVED) to the applicant. The notification that the system sends depends on the status of the resume. If the resume is from a specific source, the system looks at the setup in the Notifications 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.

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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.

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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.

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CHAPTER 16

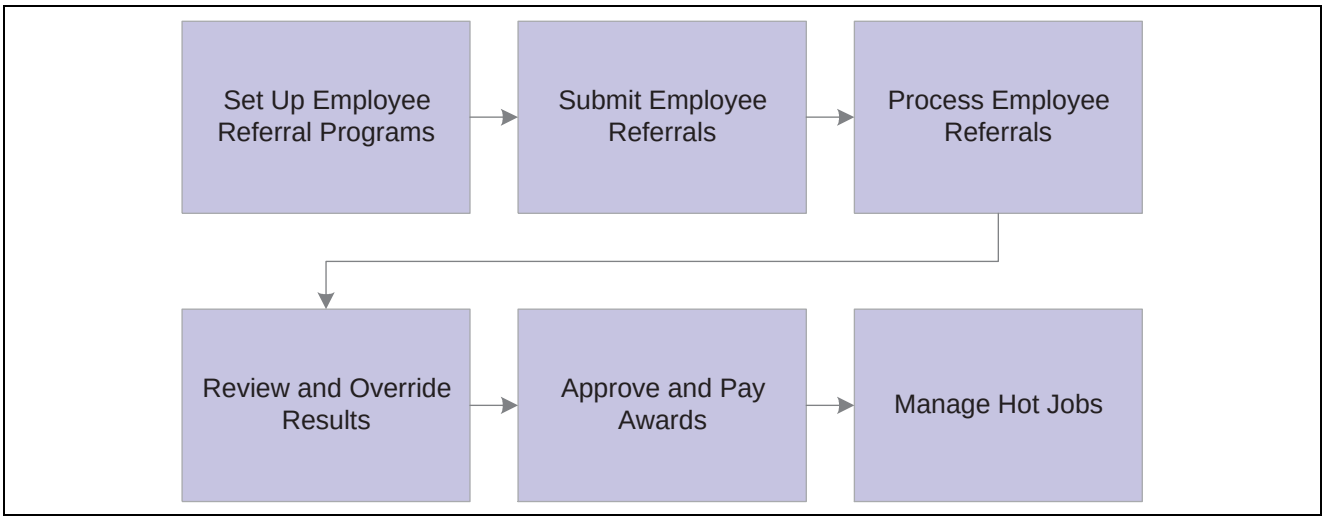
Managing Employee Referral Programs

This chapter provides an overview of the employee referral program process and discusses how to:

- Set up employee referral programs.
- Submit employee referrals.
- Run the employee referral process.
- Review and override the results.
- Approve and pay awards.
- Manage hot jobs.

Understanding the Employee Referral Program Process

The following diagram illustrates the process for setting up and administering employee referral programs.



Business process for employee referral programs

Setting Up Employee Referral Programs

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

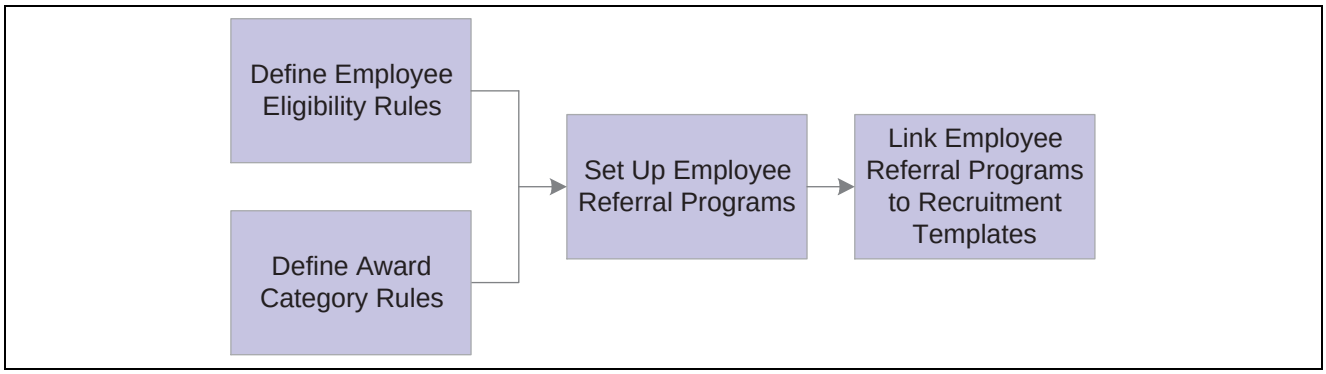
- Define employee eligibility rules.

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- Define award category rules.
- Define employee referral programs.

Understanding How to Set Up Employee Referral Programs

The following diagram illustrates the process for setting up employee referral programs.



Process for setting up employee referral programs

To set up employee referral programs:

1. Define employee eligibility rules using the Employee Eligibility Rules (HRS_RULE_ELIG) component.

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

   To define employee eligibility rules:

   a. Name and describe the employee eligibility rule on the Employee Eligibility Rules page.

   b. Create SQL statements for the employee eligibility rule on the Employee Eligibility Rules - Rule SQL page.

2. Define award category rules using the Award Category Rules (HRS_RULE_AWD) component.

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

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

   To define award category rules:

   a. Name and describe the award category rule on the Award Category Rules page.

   b. Create SQL statements for the employee eligibility rule on the Award Category Rules - Rule SQL page.

   c. Define the amounts, timing, and earnings code for the rule on the Award Schedule page.

3. Define employee referral programs using the Employee Referral Program (HRS_REF_PGM) component.

   To define employee referral programs:

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a. Name the employee referral programs.

b. Set up additional criteria.

c. Link employee eligibility and award category rules.

4. Associate an employee referral program with a recruitment template using the Recruitment Template (HRS_RCTR_TMPL) component.

   By linking a referral program to a recruitment template, the system will automatically associate a referral program with a job opening when the job opening is created. In turn, the system uses this employee referral program's rules to evaluate eligibility and pay awards for the job opening.

Pages Used to Set Up Employee Referral Programs

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

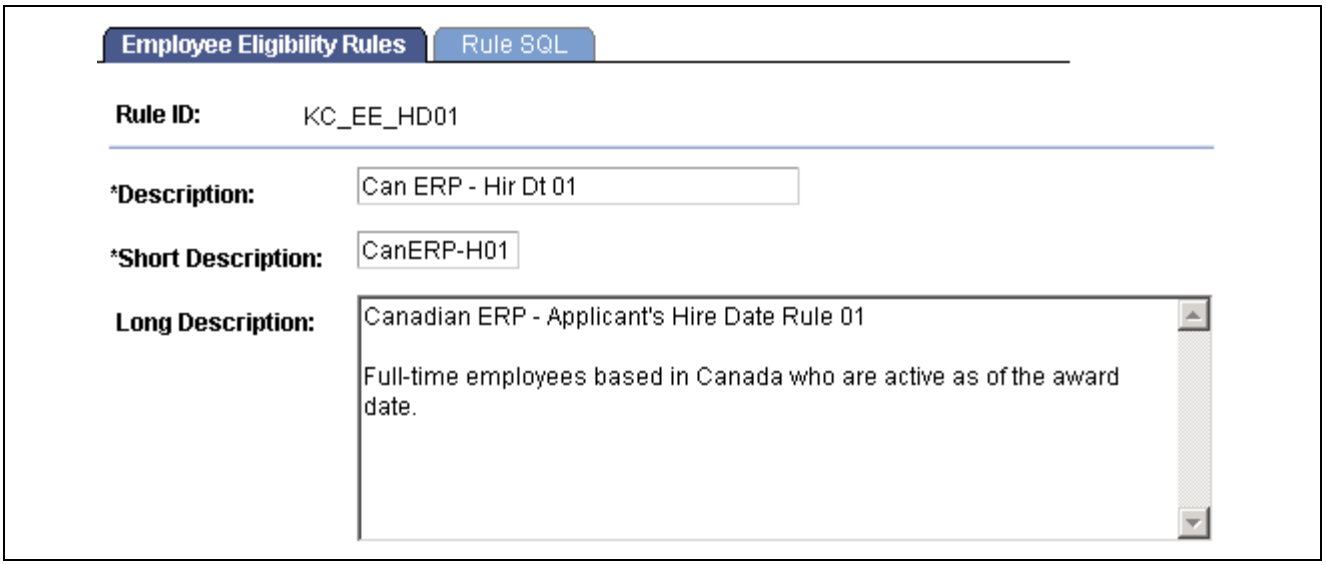
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Page Name	Object Name	Navigation	Usage
View SQL	HRS_VW_SQL	• Click the View SQL link on the Employee Eligibility Rules - Rule SQL page. • Click the View SQL link on the Award Category Rules - Rule SQL page. • Click the View SQL link on the Hot Job Administration - Selection page.	View a SQL statement that the system generates from information that you enter on the Employee Eligibility Rules - Rule SQL page.
Award Schedule	HRS_RULE_AWD_SCH	Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Award Category Rules, Award Schedule	Define award schedules.
Employee Referral Programs	HRS_REF_PGM_PG	Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Employee Referral Program, Employee Referral Programs	Define employee referral programs.
Employee Referral Program - Criteria	HRS_REF_PGM_CRT	Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Employee Referral Program, Criteria	Define additional criteria that are not covered by employee eligibility or award category rules.
Employee Referral Program - 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.

Naming Employee Eligibility Rules

Access the Employee Eligibility Rules page.

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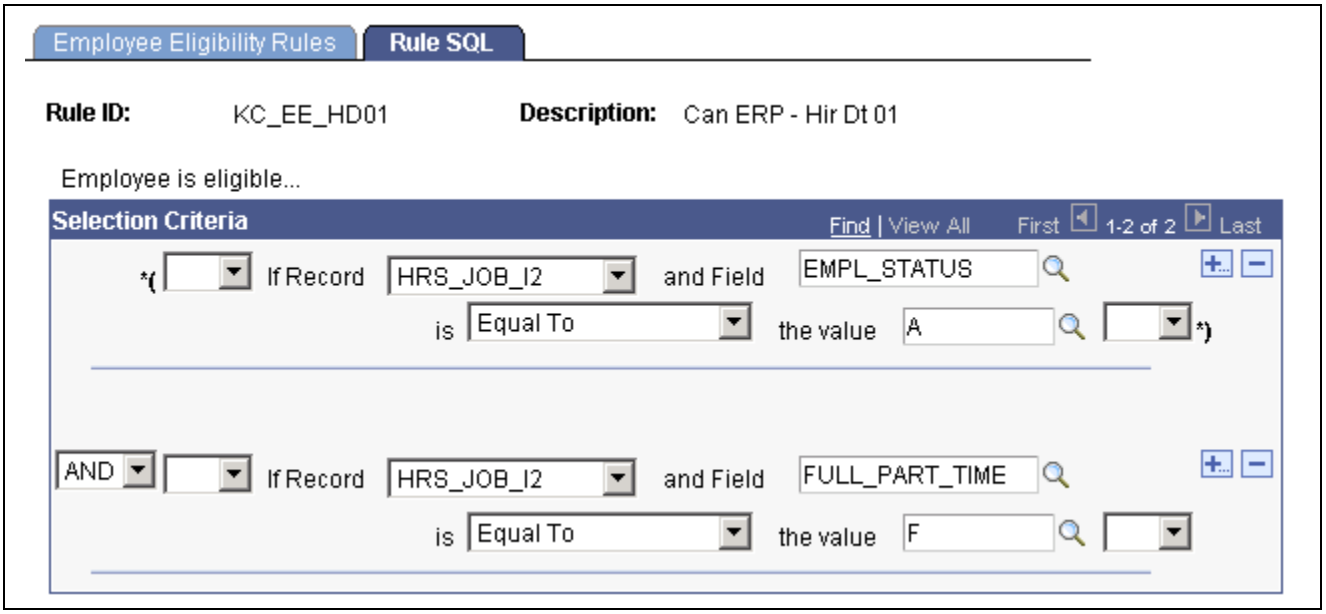


Employee Eligibility Rules page

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.

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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.

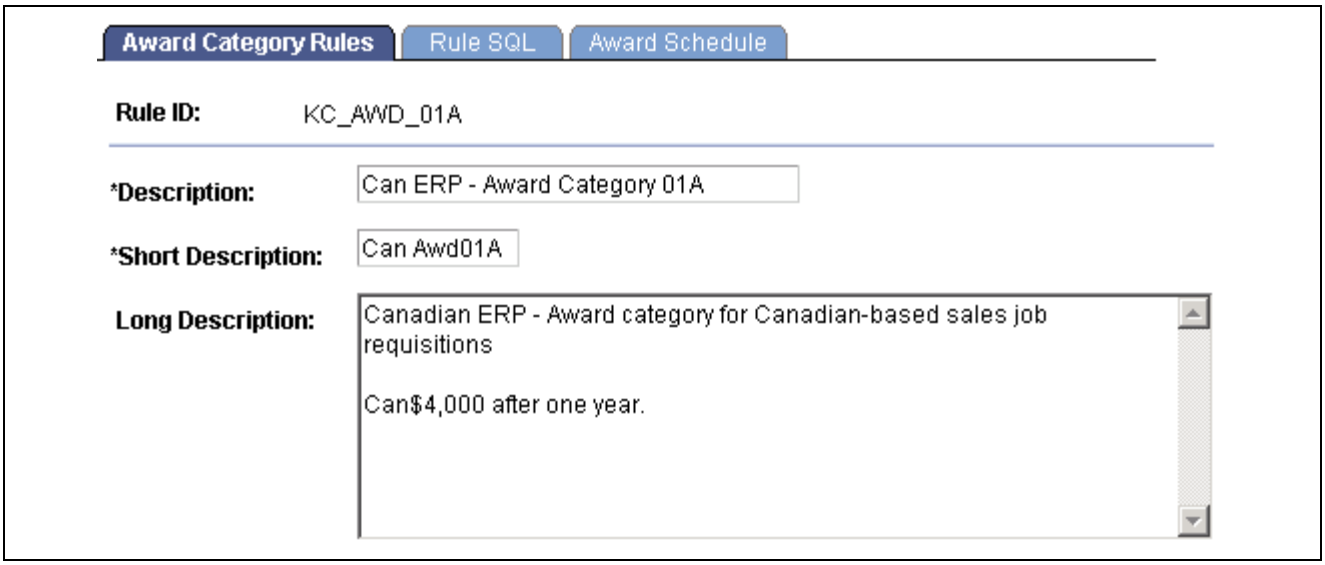
   When you add a row, select the operand *AND* or *OR* in the first field in the new row.

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.

Naming Award Category Rules

Access the Award Category Rules page.

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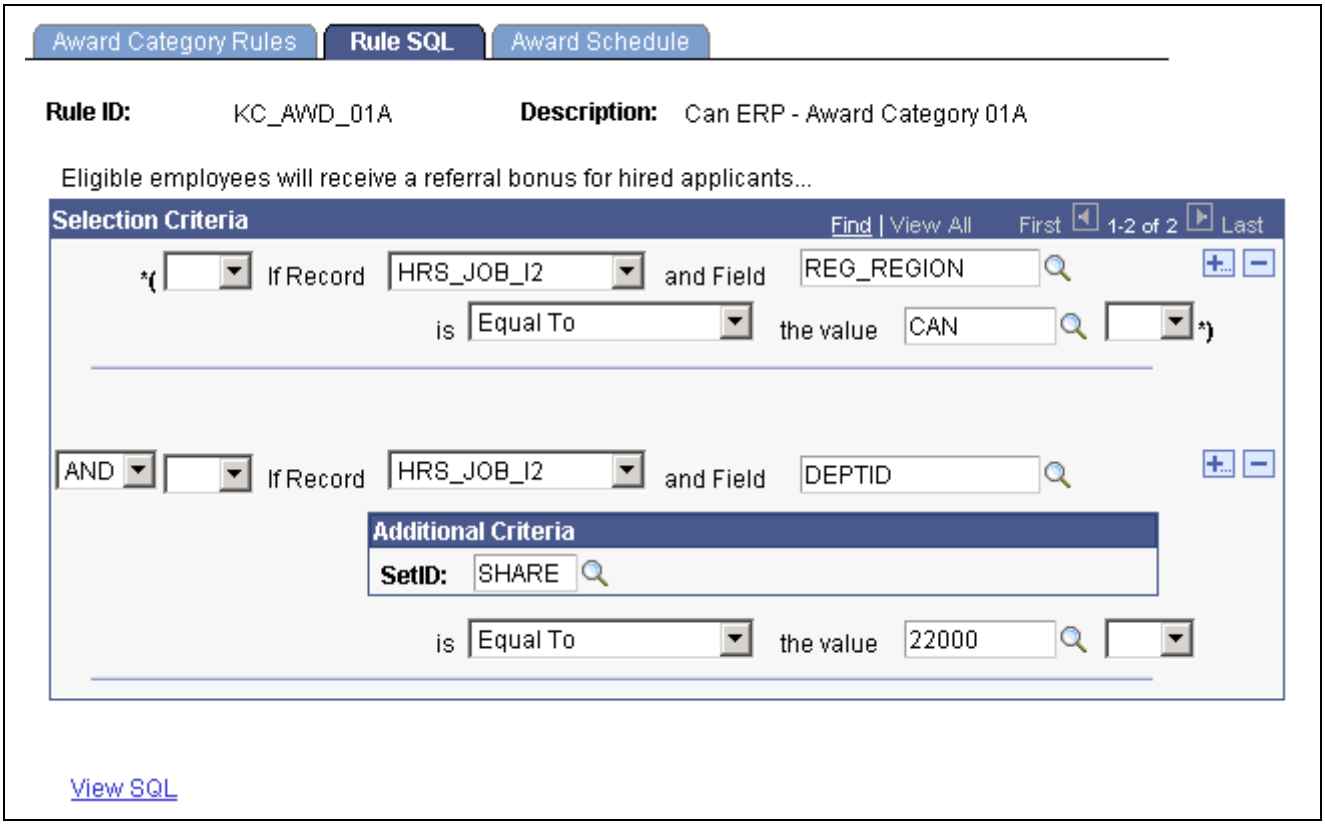


Award Category Rules page

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

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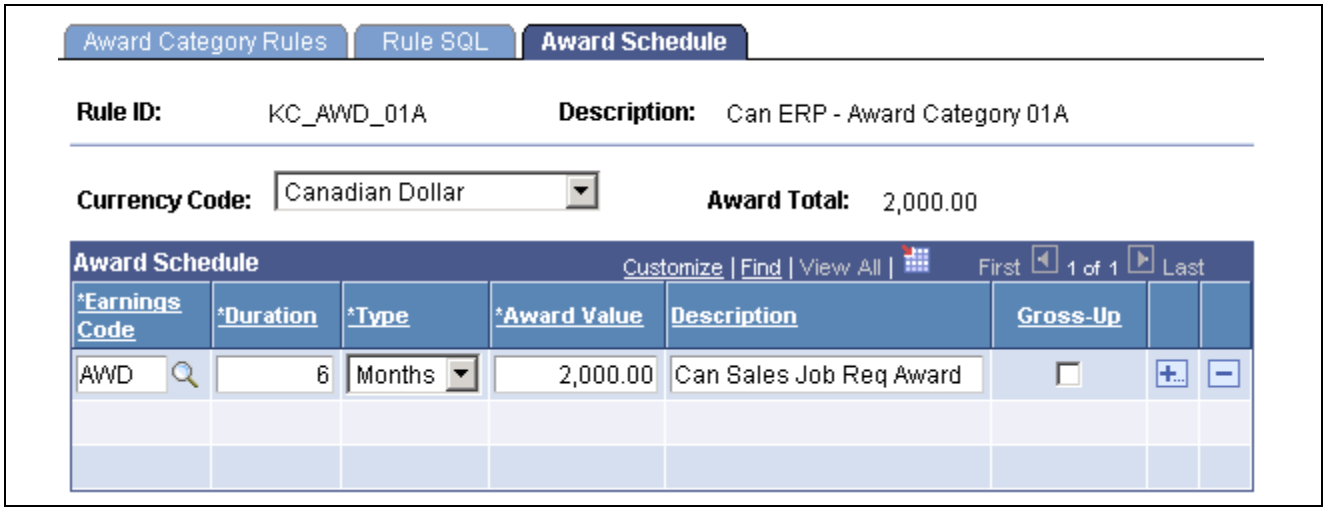
The steps that you use to construct a rule are the same as the steps that you use on the Employee Eligibility Rules - Rule SQL page.

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

See Chapter 16, "Managing Employee Referral Programs," Creating SQL Statements for Employee Eligibility Rules, page 361.

Defining 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.

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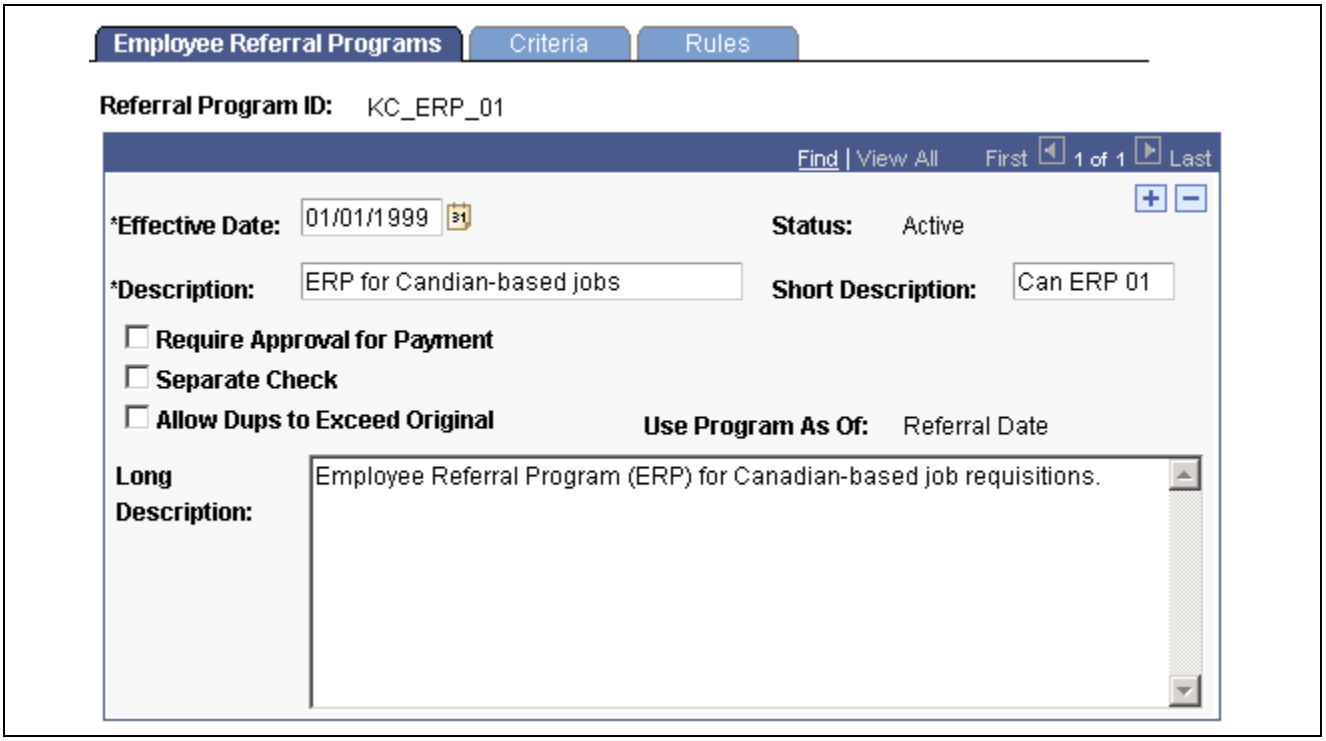
This is referred to as the award date and is the date on which the duration requirement is fulfilled; it is not necessarily the date on which the award is paid. If you use the delivered integration with Payroll for North America to pay employee referral award, the system will not send award information before the award date.

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

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

Defining Employee Referral Programs

Access the Employee Referral Programs page.



Employee Referral Programs page

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

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

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

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

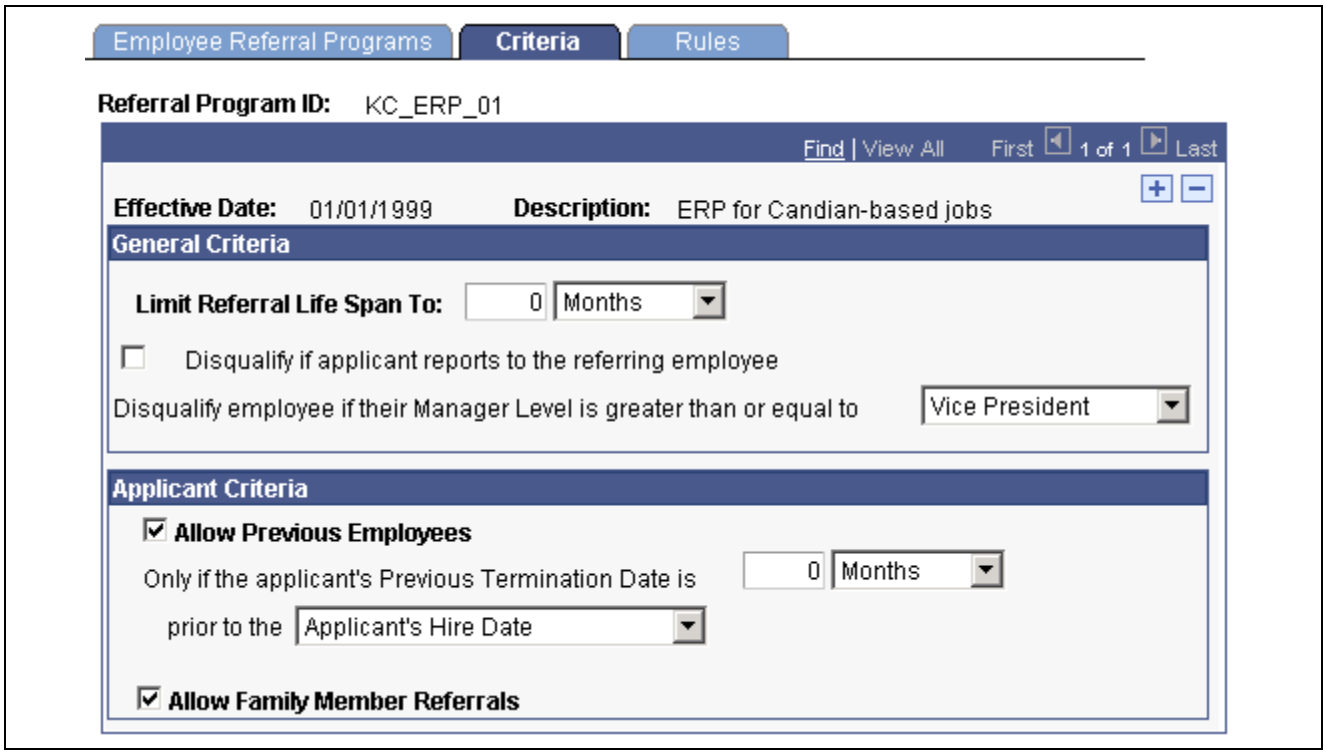
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Use Program As Of Select which effective-dated program rules apply to the referral. Valid values are *Applicant's Hire Date* and *Referral Date.* The system applies all program rules that are in the effective-dated row that is active as of the Use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

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

Defining Additional Criteria

Access the Employee Referral Program - Criteria page.



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.

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Disqualify if applicant reports to the referring employee

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

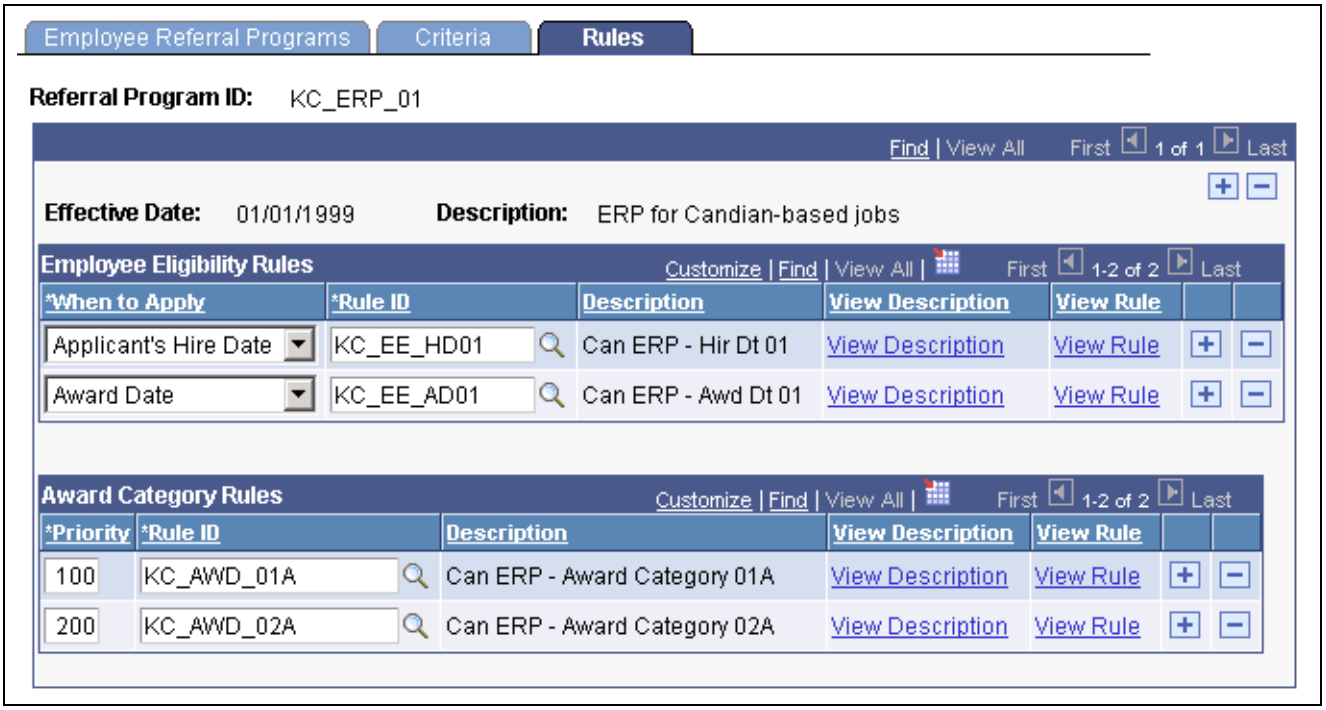
The system evaluates this criteria based on information that users provide when they refer friends online or information that recruiters enter for an applicant on the applicant data pages. It does not check the organization's historical records.

Allow Family Member Referrals

Select this check box to allow employees to refer members of their family.

Selecting Employee Eligibility and Award Category Rules

Access the Employee Referral Program - Rules page.



Employee Referral Program - Rules page

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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.

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Submitting Referrals

This section provides an overview of employee and applicant referrals and lists the pages used to submit, confirm, and review referrals.

Understanding Employee and Applicant Referrals

The two referral methods are:

- 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.

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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 Chapter 3, "Setting Up Recruiting Templates," Setting Up Resume Templates, page 44.

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 7, "Entering Applicants," Entering Application Details, page 170.

See Also

PeopleSoft Enterprise Candidate Gateway 9.0 PeopleBook, "Using Candidate Gateway," Applying for Job Openings

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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 - Details	HRS_EE_REVW_DTL	Click a name link on the Review Referral (HRS_EE_REVW_SRCH) page.	View details for a specific referral.

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Processing Employee Referrals

This section provides overviews of the Employee Referral Program (HRS_ERP_MAIN) process and payment statuses and discusses how to process eligibility and awards.

Understanding the Employee Referral Program Process

When you set up employee referral programs, you capture time-sensitive rules that dictate eligibility and awards for each referral under the particular employee referral program. The Employee Referral Program process applies these time-sensitive rules at the appropriate times in a referral's life span.

It is necessary to establish which employee referral program a referral is associated with before determining eligibility and awards. This association occurs only when an applicant is hired into a job opening that has an employee referral program associated. Therefore, you cannot determine eligibility and awards before an applicant is hired.

You can run the Employee Referral Program process for a specific employee referral program or for all employee referral programs. The Employee Referral Program process determines eligibility, creates awards, and processes award payments through PeopleSoft 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 16, "Managing Employee Referral Programs," Approving and Paying Referral Awards, page 387.

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

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Rule or Criterion	Referral Date	Hire Date	Award Date
Referral life span criteria	NA	Applies (checks the referral life span value in the Limit Referral Life Span To field on the Employee Referral Program - Criteria page against the time elapsed between the referral and hire dates).	NA
Employee is a direct or indirect manager of the hired applicant	NA	Applies if the Disqualify if applicant reports to the referring employee option is selected on the Employee Referral Program - Criteria page.	NA
Manager level criteria	NA	Applies (checks the value in the Disqualify employee if their Manager Level is greater than or equal to field on the Employee Referral Program - Criteria page).	NA
Previous employee criteria	May apply, depending on whether the Allow Previous Employees option is selected and on the value in the prior to the field on the Employee Referral Program - Criteria page.	May apply, depending on whether the Allow Previous Employees, option is selected and on the value in the prior to the field on the Employee Referral Program - Criteria page.	NA
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.

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- 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:

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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.

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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.

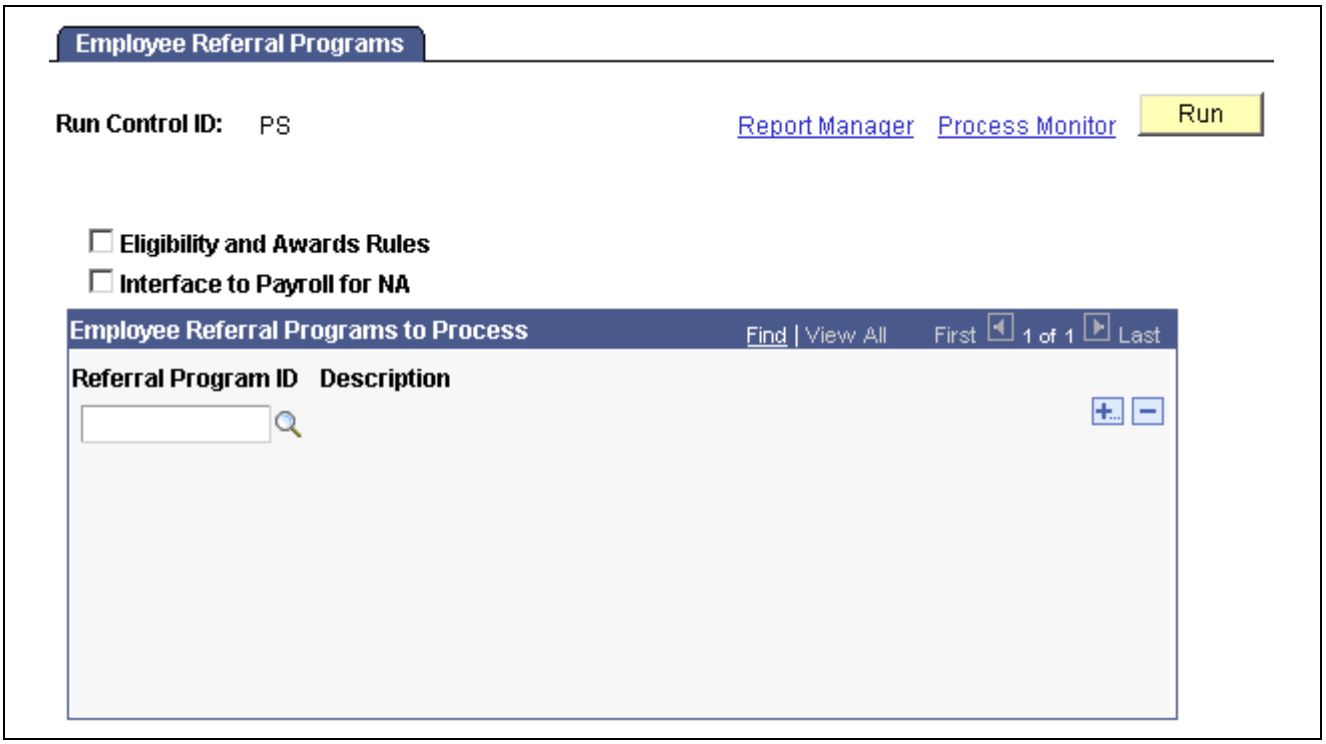
Page Used to Process Eligibility and Awards

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.

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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

Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications

Reviewing and Overriding Referral Awards

This section provides an overview of referral overrides, lists common elements, and discusses how to:

- View referral summary information.
- View and override employee eligibility.
- View awards.
- Override award details.

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- 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.

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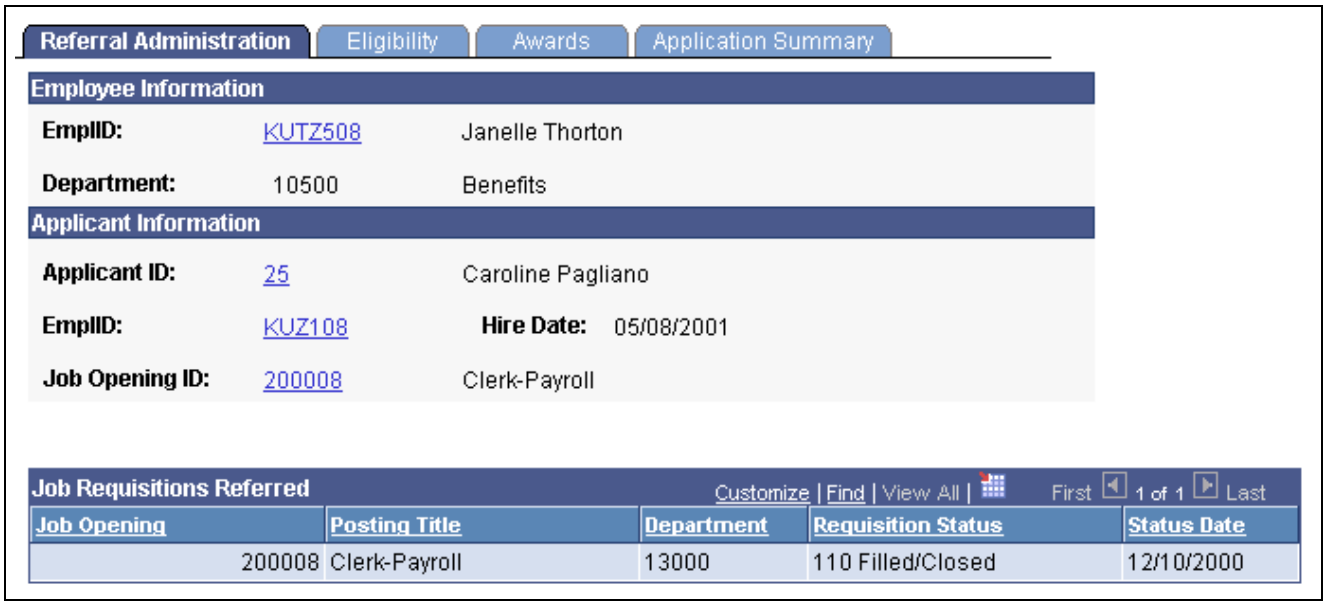
Pages Used to View and Override Referral Awards

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.

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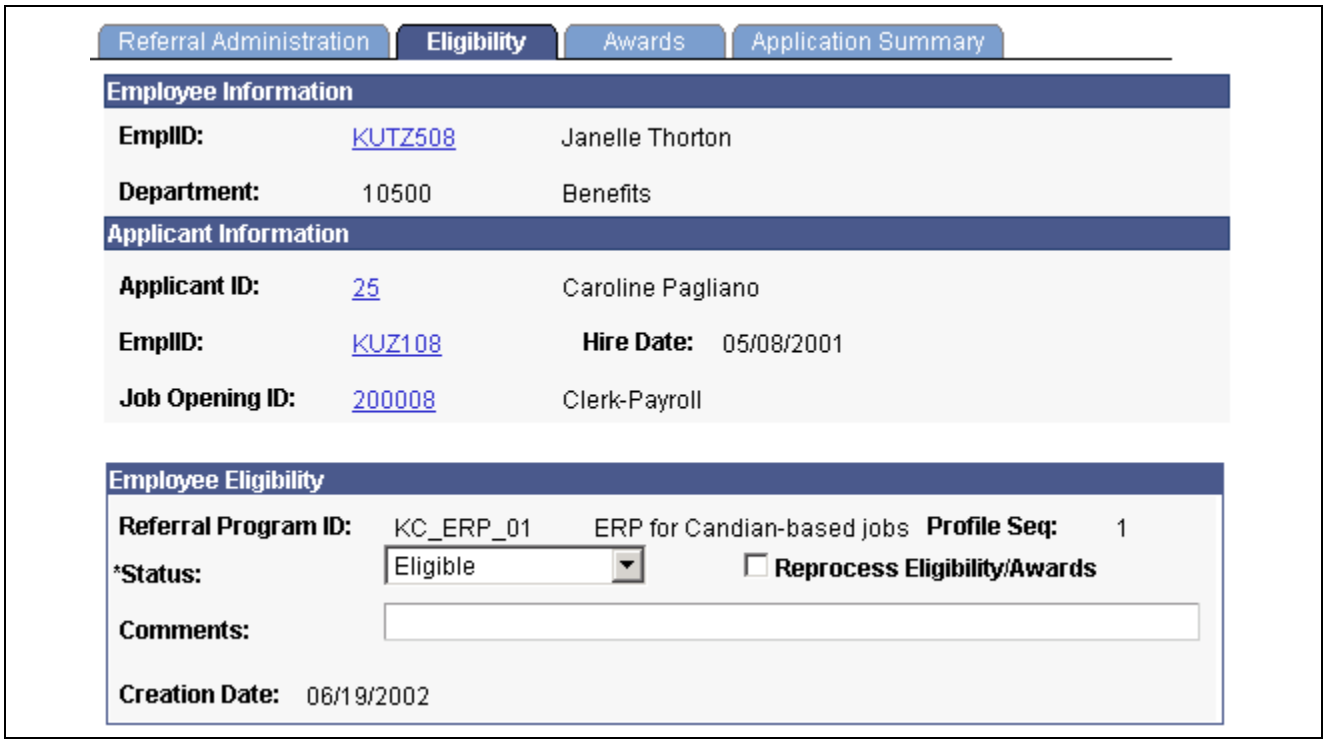
Referral Administration page

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

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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.

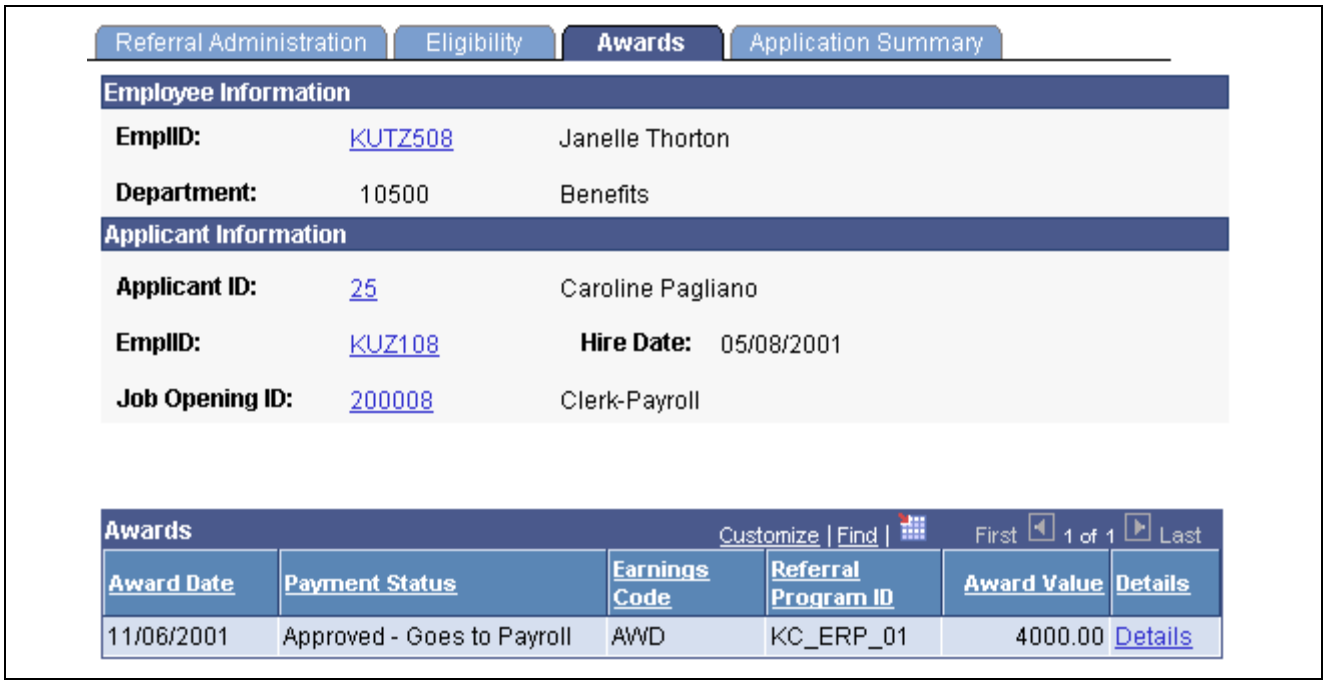
Referral Eligibility Rule: Eligibility rule associated with the referral date in the When to Apply field on the Employee Referral Program - Rules page.

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.

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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 16, "Managing Employee Referral Programs," Understanding Payment Statuses, page 374.

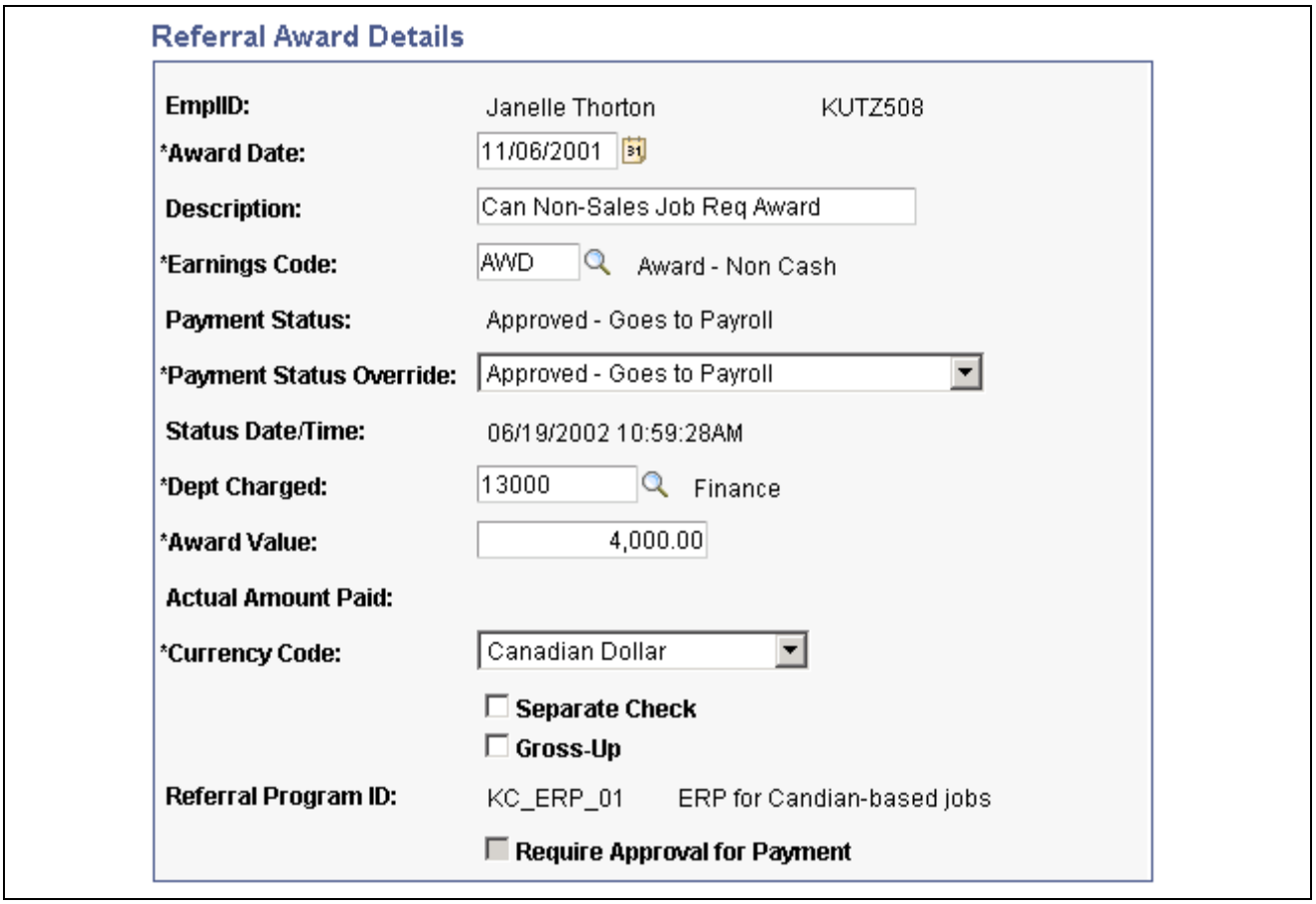
Award Value Displays the award value. The system determines this value based on the award schedule of the award category.

Details Click to access the Referral Award Details page, where you can override award details.

Overriding Award Details

Access the Referral Award Details page.

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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.

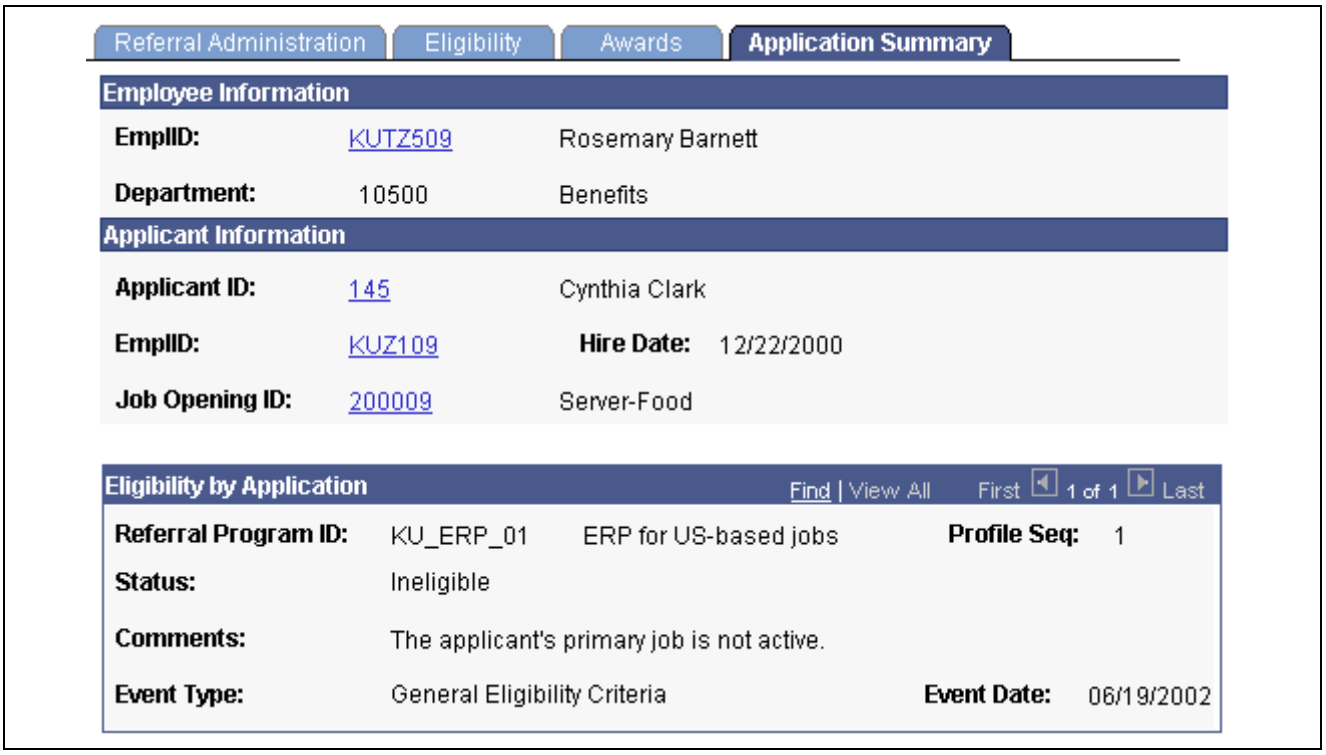
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	Approved: You corrected the reason for the rejection and now the award is ready to be submitted when the process runs again for the employee referral program.
Dept Charged (department charged)	Displays the department (of the job opening) into which 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.

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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.

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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.

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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 and Paying Referral Awards

This section provides overviews of award approvals and paying awards, and discusses how to.

- Approve referral awards.
- Submit awards.
- View rejected awards.
- Edit rejected awards.

Understanding Award Approvals

When you set up the employee referral program, define whether awards require approval before payment. If approval is required, the system assigns the awards the Needs Approval payment status when you run the Employee Referral Program process. You must manually approve the awards.

To manually approve awards, you can:

- Use the 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 16, "Managing Employee Referral Programs," Viewing Rejected Awards, page 391.
- 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 16, "Managing Employee Referral Programs," Overriding Award Details, page 382.

Understanding Paying Awards

The interface between employee referral programs and payroll processing depends upon the payroll system that you use to pay the referring employee. If you pay employees through Payroll for North America, use the Employee Referral Program process to send the monetary and non-stock, non-monetary awards directly to Payroll for North America using PeopleSoft Integration Broker. If you pay employees through a payroll system other than Payroll for North America, you must create an interface to that payroll system.

Access the Process Referral Programs - 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.

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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.

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Integration Step	Description
Employee referral program subscribes to the acknowledgement of rejected awards or awards with errors.	Employee referral program administrator uses the Rejected Awards page to view the reason for rejection and the Referral Award Details page to correct the award data.
Payroll processes validated awards and issues checks.	Payroll creates paysheets, calculates gross-up amounts and taxes, confirms pay, issues checks, and posts amounts to the general ledger.
Payroll runs a PeopleSoft Application Engine process to send a notification of payment.	This process runs after payments are calculated and confirmed.
Employee referral program subscribes to the notification of payment.	The subscription updates the award's payment status to Paid or Reversed by Payroll and updates the status date and time, actual amount paid, paycheck status, paycheck number, and check date.

Enterprise Integration Points

This table describes the service operation that are used to transfer awards and payout data between Recruiting Solutions and Payroll for North America:

Integration Point	Service Operation	Definition
ERECRUIT REQUEST FOR PAYMENT	PAYMENT_ERECRUIT_ REQUEST	Recruiting Solutions publishes award data to payroll and payroll subscribes to the award data.
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 PeopleBook: Integration Broker

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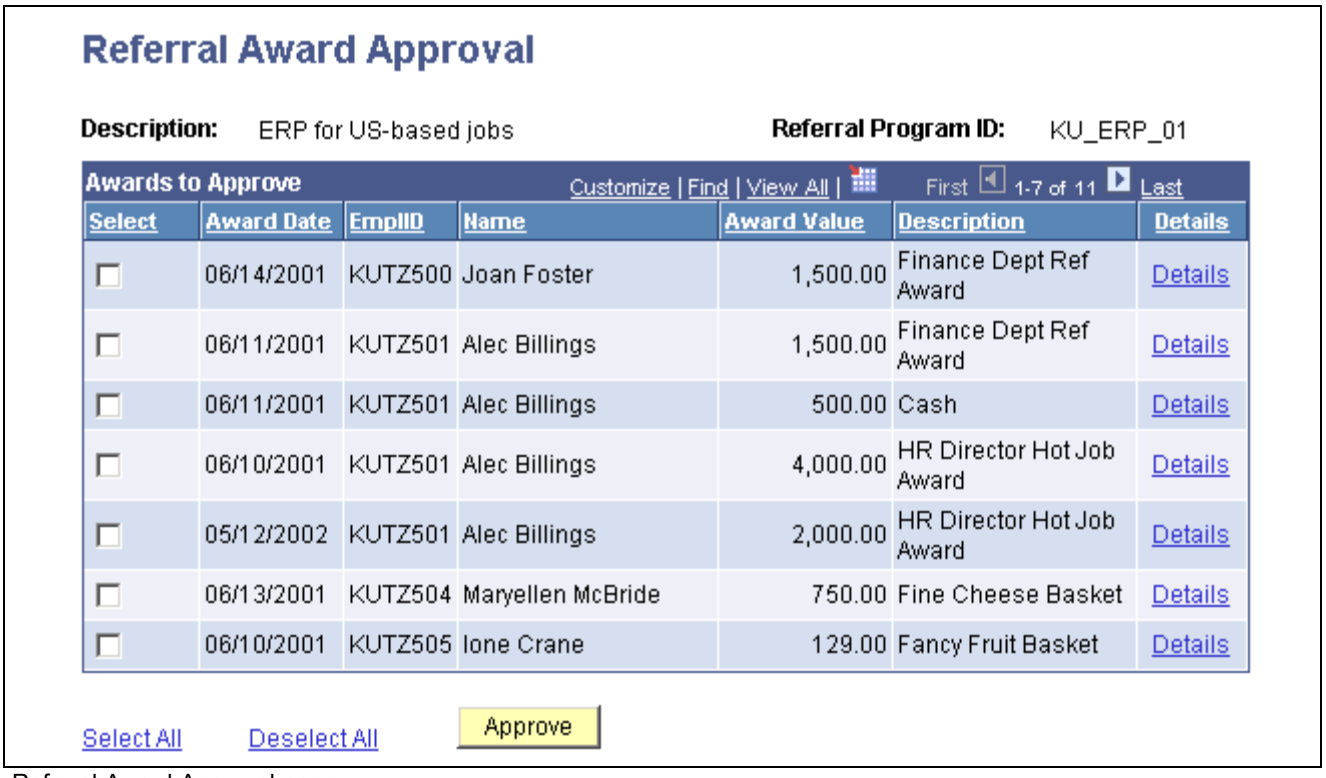
Pages Used to Approve and Pay Referral Awards

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.
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.

Approving Referral Awards

Access the Referral Award Approval page.

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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.

Submitting Awards

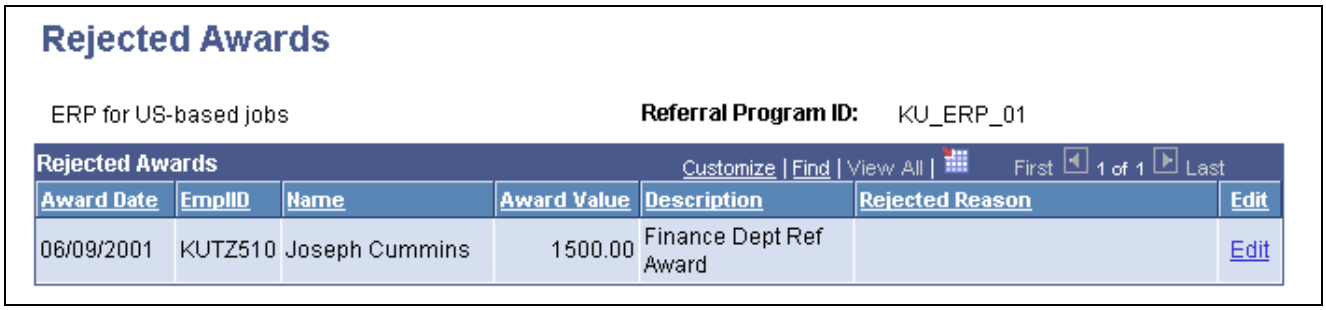
Access the Process Referral Programs - Employee Referral Programs page.

See Chapter 16, "Managing Employee Referral Programs," Processing Eligibility and Awards, page 376.

Viewing Rejected Awards

Access the Rejected Awards page.

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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 16, "Managing Employee Referral Programs," Overriding Award Details, page 382

Chapter 16, "Managing Employee Referral Programs," Viewing and Overriding Employee Eligibility, page 380

Managing Hot Jobs

This section provides an overview of hot jobs and discusses how to:

- Name and describe hot job categories.
- Create SQL statements to define job opening selection criteria.
- Remove selected job openings from the hot job category.
- Set up award schedules.

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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.
6. View the history of a requisition's hot job status on the Hot Job History page.

Note. The Hot Jobs component also includes the same Awards Schedule page that appears in the Employee Referral Program component.

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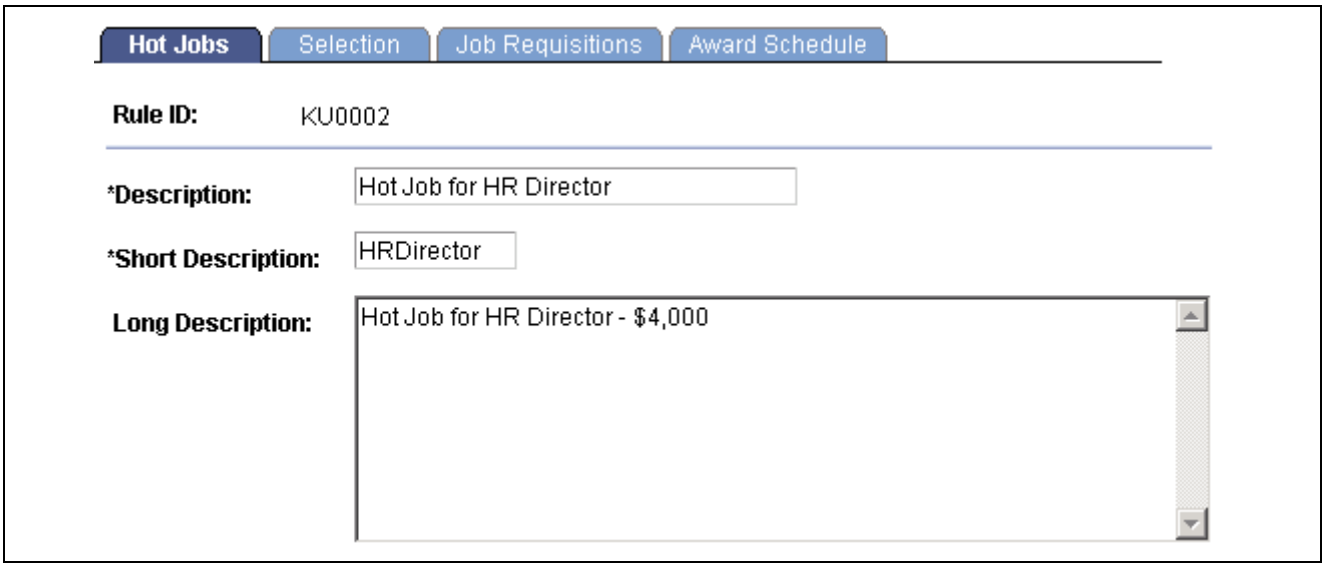
Pages Used to Manage Hot Jobs

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.
Hot Job History	ER_HOTJOB_HIST	Recruiting, Job Requisitions/Postings, Review Requisition Information, Review Hot Job History, Hot Job History	View the history of a job opening's hot job status.

Naming and Describing Hot Job Categories

Access the Hot Jobs page.

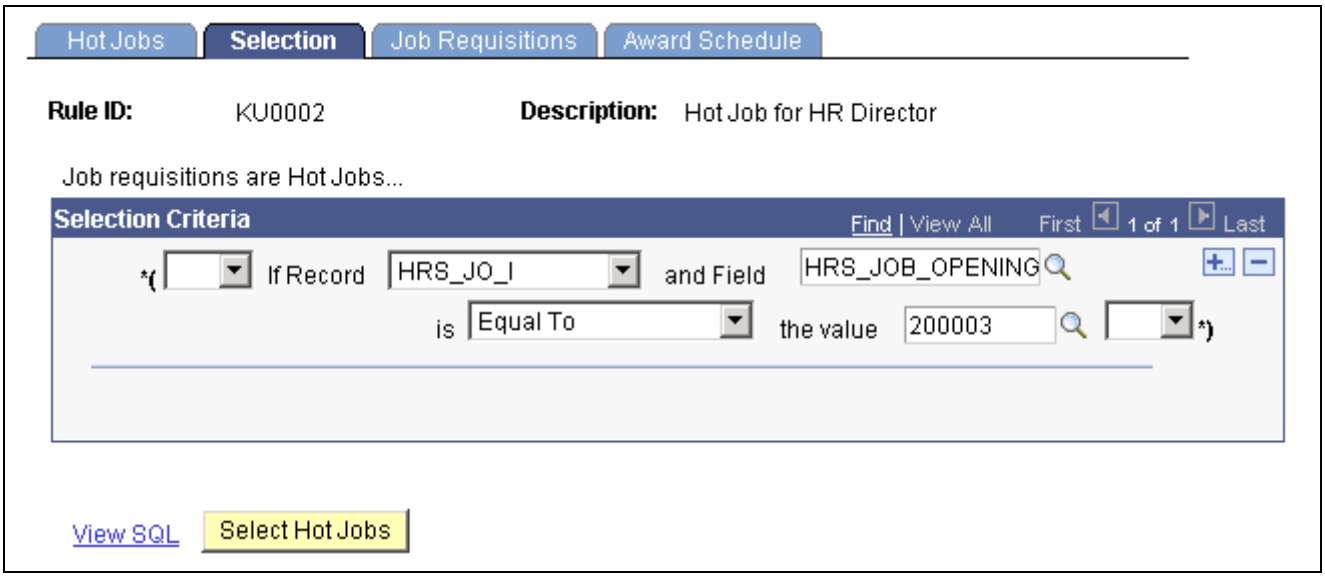
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Hot Jobs page

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 16, "Managing Employee Referral Programs," Creating SQL Statements for Employee Eligibility Rules, page 361.

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.

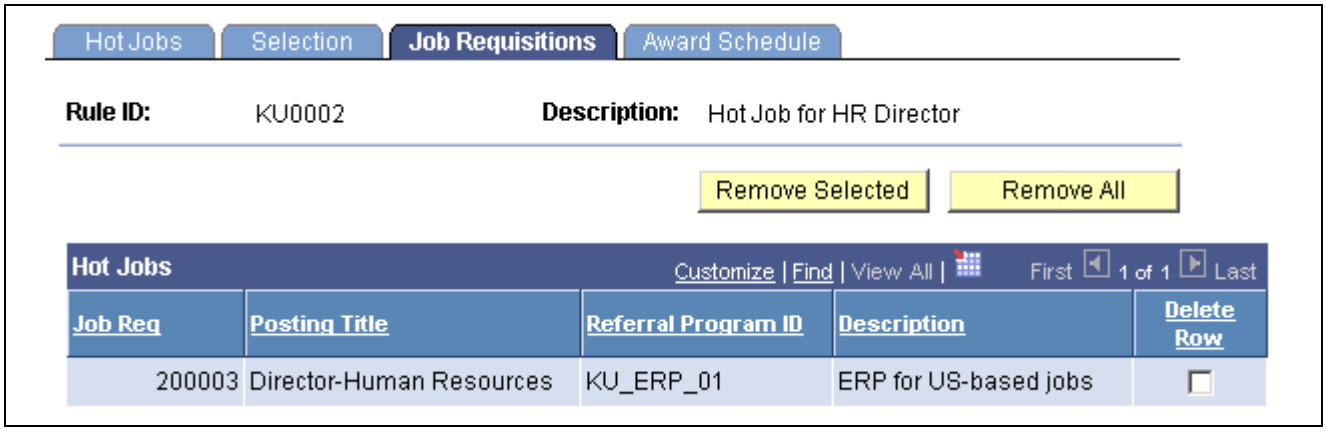
The system does not list job openings that have already been selected into another hot job category.

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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

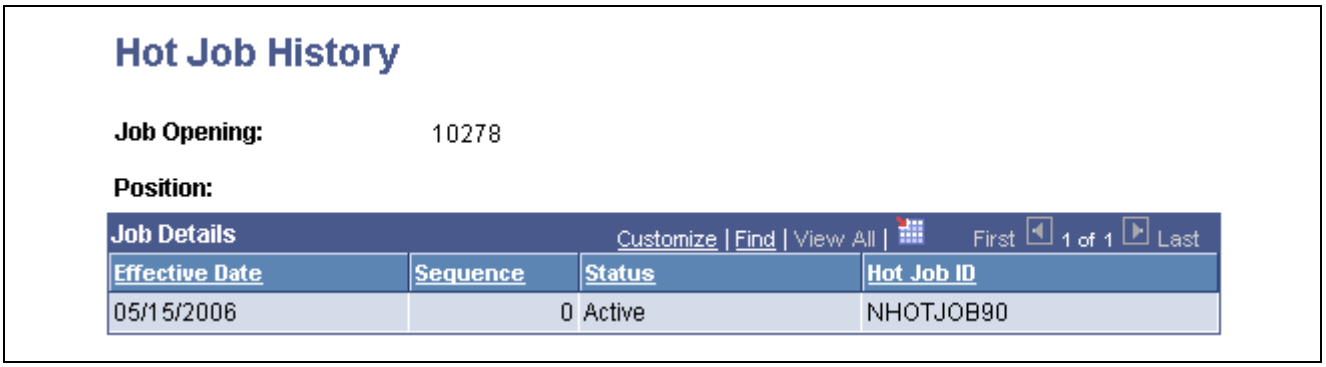
Access the Award Schedule page.

See Chapter 16, "Managing Employee Referral Programs," Defining Award Schedules, page 364.

View Hot Job History

Access the Hot Job History page.

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Hot Job History

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APPENDIX A

Delivered Workflows for Talent Acquisition Manager

This appendix discusses:

- Delivered workflows for Talent Acquisition Manager.
- Delivered notification templates.

See Also

Enterprise PeopleTools PeopleBook: Workflow Technology

Enterprise PeopleTools 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

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Working with Approvals"

Chapter 6, "Creating Job Openings," page 121

Chapter 10, "Making Job Offers," page 233

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.

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Workflow Objects

Event	Launch, Approve
Participant	Approvers
Email Template	JobOfferApproval
Business Process	PTAF_APPROVALS
Business Activity	PTAF_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	PTAF_APPROVALS
Business Activity	PTAF_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.

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Workflow Objects

Event	OnDeny
Participant	Requester
Email Template	JobOfferDeny
Business Process	PTAF_APPROVALS
Business Activity	PTAF_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	PTAF_APPROVALS
Business Activity	PTAF_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.

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Workflow Objects

Event	Escalate
Participant	Dynamic
Email Template	JobOfferEscalation
Business Process	PTAF_APPROVALS
Business Activity	PTAF_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	PTAF_APPROVALS
Business Activity	PTAF_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.

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Workflow Objects

Event	Termination
Participant	Requester
Email Template	JobOfferTermination
Business Process	PTAF_APPROVALS
Business Activity	PTAF_AW_ROUTE

See Also

Chapter 10, "Making Job Offers," Understanding Job Offer Approvals, page 238

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	PTAF_APPROVALS
Business Activity	PTAF_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.

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Workflow Objects

Event	OnApprove
Participant	Requester
Email Template	JobOpeningApproved
Business Process	PTAF_APPROVALS
Business Activity	PTAF_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	PTAF_APPROVALS
Business Activity	PTAF_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.

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Workflow Objects

Event	Error
Participant	Administrator
Email Template	JobOpeningError
Business Process	PTAF_APPROVALS
Business Activity	PTAF_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.
Action Description	The system notifies the approver and the approver's supervisor and routes the job opening to the next step.
Notification Method	Email and worklist.

Workflow Objects

Event	Escalate
Participant	Dynamic
Email Template	JobOpeningEscalation
Business Process	PTAF_APPROVALS
Business Activity	PTAF_AW_ROUTE

Job Opening Review

This section discusses the Job Opening Review workflow.

Description

Event Description	An approver routes the job opening to reviewers to review.
Action Description	The system notifies reviewers that they must review the job opening.
Notification Method	Email and worklist.

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Workflow Objects

Event	Review
Participant	Reviewers
Email Template	JobOpeningReview
Business Process	PTAF_APPROVALS
Business Activity	PTAF_AW_ROUTE

Job Opening Termination

This section discusses the Job Opening Termination workflow.

Description

Event Description	A user that has access to the job opening makes a change to a field that might require the job opening to be evaluated again or an administrator overrides the approval process.
Action Description	The system terminates the job opening approval process and notifies the requester.
Notification Method	Email and worklist.

Workflow Objects

Event	Termination
Participant	Requester
Email Template	JobOpeningTermination
Business Process	PTAF_APPROVALS
Business Activity	PTAF_AW_ROUTE

See Also

Chapter 6, “Creating Job Openings,” Understanding Job Opening Approvals, page 156

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

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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

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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

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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

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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

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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

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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

Enterprise 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. **Note.** This report does not support languages other than the base language.	Recruiting, Reports, Adverse Impact (USA), Adverse Impact Analysis (USA)	RUN_CNTL_REG_INTRO
HRS001UK Adverse Impact (UK)	Lists job offers and applications by ethnic groups and gender.	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

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Report ID and Report Name	Description	Navigation	Run Control Page
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
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). **Note.** This report does not support languages other than the Base Language	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

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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

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Glossary of PeopleSoft Enterprise 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 Enterprise Human Resources, PeopleSoft Enterprise Benefits

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Administration, PeopleSoft Enterprise Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

action template In PeopleSoft Enterprise 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 Enterprise 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 Enterprise 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 Enterprise 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

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	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 Enterprise 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 Enterprise Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	The arbiter when multiple price rules match the transaction. This plan determines the order in which the price rules are applied to the transaction base price.
assessment rule	In PeopleSoft Enterprise 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 Enterprise Directory Interface, relates the data that makes up an entry in the directory information tree.
auction event	In PeopleSoft Strategic Sourcing, a sourcing event where bidders actively compete against one another to achieve the best price or score.
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 Enterprise Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Enterprise Workforce Analytics Solution, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
bid response	In PeopleSoft Strategic Sourcing, the response by a bidder to an event.
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 Enterprise 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."

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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 Enterprise Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

In PeopleSoft Enterprise 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 Enterprise product families and are supported by the Business Process Engineering group. 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 unit constraints In PeopleSoft Strategic Sourcing, these constraints apply to a selected Strategic Sourcing business unit. Spend is tracked across all of the events within the selected Strategic Sourcing business unit.

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 Enterprise 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.

buy event In PeopleSoft Strategic Sourcing, for event creators, the purchase of goods or services, most typically associated with a request for quote, proposal, or reverse auction.For bidders, the sale of goods or services.

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.

cash drawer A repository for monies and payments taken locally.

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 Enterprise Catalog Management, translates values from the catalog source data to the format of the company's catalog.

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catalog partner In PeopleSoft Enterprise 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 Enterprise 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 Enterprise 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.

claimback In the wholesale distribution industry, a contract between supplier and distributor, in which monies are paid to the distributor on the sale of specified products or product groups to targeted customers or customer groups.

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 Enterprise 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*.

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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, PeopleTools maintains a set of collections (one per language code) for each search index object.

collection rule In PeopleSoft Enterprise 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 Enterprise database information using a program instead of the PeopleSoft client.

condition In PeopleSoft Enterprise 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 Enterprise. 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).

constraint A business policy or rule that affects how a sourcing event is awarded. There are three types of constraints: business, global, and event.

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

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	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 plus contract line	A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.
cost plus pricing	In PeopleSoft Enterprise Pricer, a pricing method that begins with cost of goods as the basis.
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.
counter sale	A face-to-face customer transaction where the customer typically selects items from the storefront or picks up products that they ordered ahead of time. Customers pay for the goods at the counter and take the goods with them instead of having the goods shipped from a warehouse.
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.

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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 Enterprise Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, and rail). 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.

direct receipt

Items shipped from a warehouse or vendor to another warehouse.

direct ship

Items shipped from the vendor or warehouse directly to the customer (formerly referred to as *drop ship*).

directory information tree

In PeopleSoft Enterprise 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 Enterprise 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 Enterprise 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.

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elimination set In PeopleSoft Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event In PeopleSoft Enterprise 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 Enterprise 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 Enterprise Human Resources, also refers to an incident that affects benefits eligibility.

event constraints In PeopleSoft Strategic Sourcing, these constraints are associated with a specific sourcing event. Spend is tracked within the selected event.

event propagation process In PeopleSoft Enterprise 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. PeopleSoft Enterprise Enterprise Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.

exception In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute.

exclusive pricing In PeopleSoft Enterprise 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 Enterprise 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.

financial sanctions For U.S. based companies and their foreign subsidiaries, a federal regulation from the Office of Foreign Assets Control (OFAC) requires that vendors be validated against a Specially Designated Nationals (SDN) list prior to payment.

For PeopleSoft Payables, eSettlements, Cash Management, and Order to Cash, you can validate your vendors against any financial sanctions list (for example, the SDN list, a European Union list, and so on).

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.

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fund In PeopleSoft Enterprise 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 Enterprise 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.

GDS Abbreviation for *Global Distribution System.* Broad-based term to describe all computer reservation systems for making travel plans.

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.

global constraints In PeopleSoft Strategic Sourcing, these constraints apply across multiple Strategic Sourcing business units. Spend is tracked across all of the events from the multiple Strategic Sourcing business units.

group In PeopleSoft Enterprise Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

In PeopleSoft Enterprise 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 Enterprise Time and Labor, for example, employees are placed in groups for time reporting purposes.

ideal response In PeopleSoft Strategic Sourcing, a question that requires the response to match the ideal value for the bid to be considered eligible for award. If the response does not match the ideal value, you can still submit the bid, but it will be disqualified and ineligible for award.

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, and user interaction objects.

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incentive rule In PeopleSoft Enterprise 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 Enterprise 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 Enterprise applications to work seamlessly with other PeopleSoft Enterprise applications or with third-party systems or software.

integration point An interface that a system uses to communicate with another PeopleSoft Enterprise 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 Enterprise Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).

In PeopleSoft Enterprise 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 Enterprise 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.

itinerary In PeopleSoft Expenses, a collection of travel reservations. Itineraries can have reservations that are selected and reserved with the travel vendor. These itineraries are not yet paid for and can be referred to as *pending reservations.* Reservations that have been paid for are referred to as *confirmed reservations.*

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.

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keyword In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Enterprise 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.

KVI Abbreviation for *Known Value Item.* Term used for products or groups of products where the selling price cannot be reduced or increased.

landlord In PeopleSoft Real Estate Management, an entity that owns real estate and leases the real estate to tenants.

LDIF file Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft Enterprise 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.

lease In PeopleSoft Real Estate Management, a legally binding agreement between a landlord and a tenant, where the tenant rents all or part of a physical property from the landlord.

lease abstract In PeopleSoft Real Estate Management, a summarized version of the complete lease contract with only the important terms. The lease abstract usually fits on one page and does not include legal terminology.

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.

line In PeopleSoft Strategic Sourcing, an individual item or service upon which there can be a bid.

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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 Enterprise 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 Enterprise Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Enterprise Inventory that is used to track the weight, the volume, and the destination of a shipment.

local functionality In PeopleSoft Enterprise 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 Enterprise 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 Enterprise 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 Enterprise 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.

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meta-SQL Meta-SQL constructs expand into platform-specific 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 Enterprise 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 Enterprise 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.

NDP Abbreviation for *Non-Discountable Products.* Term used for products or groups of products where the selling price cannot be decreased.

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.

Optimization Engine A PeopleTools component that Strategic Sourcing leverages to evaluate bids and determine an ideal award allocation. The award recommendation is based on maximizing the value while adhering to purchasing and company objectives and constraints.

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 Enterprise and non-PeopleSoft Enterprise 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 Enterprise 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 Enterprise 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.

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PeopleCode PeopleCode is a proprietary language, executed by the PeopleSoft Enterprise 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 Enterprise 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.

phase A level 1 task, meaning that if a task had subtasks, the level 1 task would be considered the phase.

pickup quantity The product quantity that the customer is taking with them from the counter sales environment.

plan In PeopleSoft Enterprise 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 Enterprise 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

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	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 Enterprise 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.
predecessor task	A task that you must complete before you start another task.
price breaks	In PeopleSoft Strategic Sourcing, a price discount or surcharge that a bidder may apply based on the quantity awarded.
price components	In PeopleSoft Strategic Sourcing, the various components, such as material costs, labor costs, shipping costs, and so on that make up the overall bid price.
price list	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	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 conditions	Conditions that select the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields relate to the transaction.
price rule key	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 Enterprise 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.

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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 Enterprise 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 appear with the product name and release number.

product adds The pricing functionality where buying product A gets product B for free or at a price (formerly referred to as *giveaways*).

product bidding In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

product category In PeopleSoft Enterprise Incentive Management, indicates an application in the PeopleSoft 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 Oracle's PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified partners.

product line The name of a PeopleSoft Enterprise 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 Enterprise 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 Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

promotion In PeopleSoft Enterprise 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.

proxy bidding In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

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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 Enterprise 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 Enterprise Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Enterprise 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 Enterprise Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, and channels.

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 Enterprise 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.

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REN server Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

reservations In PeopleSoft Expenses, travel reservations that have been placed with the travel vendor.

reversal indicator In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.

RFI event In PeopleSoft Strategic Sourcing, a request for information.

RFx event In PeopleSoft Strategic Sourcing, a request for proposal or request for a quote event when bidders submit their overall best bids and during which bidders do not actively compete against one another.

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.

saved bid In PeopleSoft Strategic Sourcing, a bid that has been created but not submitted. Only submitted bids are eligible for award.

score In PeopleSoft Strategic Sourcing, the numerical sum of answers (percentages) to bid factors on an event. Scores appear only to bidders on auction events.

SCP SCBM XML message Abbreviation for *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* 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.

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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.

sell event In PeopleSoft Strategic Sourcing, for event creators, the sale of goods or services most typically associated with forward auctions. For bidders, the purchase of goods or services.

serial genealogy In PeopleSoft Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production In PeopleSoft Enterprise 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 Enterprise 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 Enterprise 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.

short-term customer A customer not in the system who is entered during sales order entry using a template.

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single signon With single signon, users can, after being authenticated by a PeopleSoft Enterprise application server, access a second PeopleSoft Enterprise 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 Enterprise 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.

sourcing objective For constraints, the option to designate whether a business rule is required (mandatory) or is only recommended (target).

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 Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

storage level In PeopleSoft Enterprise 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 Enterprise 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.

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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 Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.

system source The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch).

When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft Enterprise system. For example, processes that import data from Microsoft Project into PeopleSoft Enterprise applications create transaction rows with a source code of MSP (Microsoft Project).

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.

task A deliverable item on the detailed sourcing plan.

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 Enterprise, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft Enterprise portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

tenant In PeopleSoft Real Estate Management, an entity that leases real estate from a landlord.

territory In PeopleSoft Enterprise 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 Enterprise product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft Enterprise applications.

tiered pricing Enables different portions of a schedule to be priced differently from one another.

time span A relative period, such as year-to-date or current period, that various PeopleSoft General Ledger functions and reports can use when a rolling time frame, rather than a specific date, is required.

total cost In PeopleSoft Strategic Sourcing, the estimated dollar cost (sum of real price dollars and potential “soft” or non-price dollars) of a particular award approach.

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travel group In PeopleSoft Expenses, the organization's travel rules and polices that are associated with specific business units, departments, or employees. You must define at least one travel group when setting up the PeopleSoft Expenses travel feature. You must define and associate at least one travel group with a travel vendor.

travel partner In PeopleSoft Expenses, the travel vendor with which the organization has a contractual relationship.

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.

trace usage In PeopleSoft Enterprise 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 Enterprise 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 Enterprise 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.

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	See also *inquiry access*.
user interaction object	In PeopleSoft Enterprise Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All PeopleSoft Enterprise 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 Enterprise 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 Enterprise data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
weight or weighting	In PeopleSoft Strategic Sourcing, how important the line or question is to the overall event. Weighting is used to score and analyze bids. For RFx and RFI events, weightings may or may not appear to bidders.
work order	In PeopleSoft Enterprise 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 Enterprise 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 JD Edwards EnterpriseOne applications.

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yield by operation In PeopleSoft Enterprise 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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Index

A

accommodations 195
accounts, bank
  entering information 195
accounts, resume email
  processing emails 115
  selecting resumes 118
  setting up 114, 116
  understanding 114
  viewing lists 117
Add Bank Account page 185
Add Citizenship page 185
Add Expenses page 265, 270, 298
Add Honors and Awards page 169
Add Languages page 168
Add Licenses and Certificates page 168
Add Memberships page 169
Add National ID page 185
Add New Applicant - Applications page 168, 169
Add New Applicant - Contact Details page 165
Add New Applicant - Eligibility & Identity page 185
Add New Applicant - Verification page 183
Add New Evaluation page 169
Add Note page 265, 269, 305
Add Person of Interest page 328
Add Primary Education page 168
Add Priority Placement page 169
Add Reference Details page 183
Add Screening Levels page 126
Add Secondary Education page 168
Add Visa Permit Details page 185
Add Work Experience page 168
additional documentation xxii
Advanced Keyword Search page 275, 283
Adverse Impact Analysis report (UK) 413
Adverse Impact Analysis report (USA) 413
  internet applicant reporting 413
agents, job
  defining days active 9
  running 294
Answer Definition page 26
answer definitions 26
applicant contracts
  defining basic information 248
  defining contract clauses 250
  defining signature dates and probation information 252
  understanding 247
applicant data
  application details 167
  contact information 165
  eligibility and identity information 184
  references 182
Applicant List page 311, 313
applicant lists
  adding applicants 315
  creating 312
  editing 314
  managing 313
  understanding 310
  viewing 311
Applicant Lists page 311
applicant records
  merging duplicates 329
applicant referrals 357, 370
  See Also employee referral programs
Applicant Resume page 298
applicant screening 29
  See Also screening
applicant searches
  building the index 283
  entering advanced criteria 288
  entering basic criteria 284
  reviewing results 287, 288
  running automatch searches 293
  saving search criteria 293
  understanding 282
applicant statuses
  changing 326
  selecting 166
Applicant Summary by Job - Run Control page 339
Applicant Summary by Job report 413

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Applicant Summary by Source - Run Control page 339
Applicant Summary by Source report 413
applicant type
defining for sites 15
applicants
activity tracking 296
applications 167, 309
checklists 315
contact information 165
contact notes and attachments 304
contracts 247
correspondence 320
dispositions, changing 301
eligibility and identity information 184
external trainees 326
forwarding 317
hiring 253
interviewing 217
job offers 233
linking to job openings 179, 324
lists 310
merging duplicates 329
pre-employment checks 245
references 182
route 215
routing 214
salary packages 252
screening 197
searching for 281
selectees for Japan 296
statuses, changing 326
statuses, selecting 166
Application Details page 168, 170
application fundamentals xxi
Application Summary page 379, 384
applications
adding information 168
creating 167, 309
editing 309
entering 169
entering details 170
setting up attachments 20
viewing 309
approvals
activating 9
employee referrals 387
job openings, adding approvers or reviewers 160
job openings, approving 159
pending, viewing 159
understanding job offer process 238
understanding job opening process 156
approvers
adding to job offers 244
adding to job openings 160
Assigned Mapping Setup page 94
Attachment Type Setup page 21
attachments
adding to applicants 177
adding to contact notes 304
adding to job openings 267
defining types 21
understanding types 20
Australia
copying to human resources 258
creating salary packages 252
automatch searches
running 293
AutoScreen - AutoScreen Setup page 103
AutoScreen Setup page 103
autoscreening
defining for sources 112
setting up 103
understanding 102
Award Category Rule page 360
award category rules
creating SQL rules 363
naming and describing 362
processing 374, 376
setting up schedules 364
Award Category Rules page 359, 362
Award Overrides page 379
award payment statuses 374
award rules
creating SQL rules 363
naming and describing 362
processing 374, 376
setting up schedules 364
Award Schedule page 360, 364, 394, 396
awards
approving referrals 387
entering 169, 181
entering job opening requirements 140
overriding referrals 377
updating 169
Awards page - Administer Referrals 379, 381

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B

background checks
  requesting 246
  reviewing details 247
  understanding 245
background screeners
  setting up 87
  setting up vendors 88
  understanding integration 85
bank accounts
  adding 185
  entering information 195
  updating 185
Browse Job Opening page 260
Browse Job Openings page 263
Build Applicant Index
  understanding 282
Build Applicant Index page 283
Build Job Index page 260
business processes 1
business units
  assigning to job openings 126

C

calendars, interview 230
Candidate Evaluations List report 414
Candidate Gateway
  activating 6
Candidate Listing - Run Control page 339
Candidate Listing report 414
Candidate Name Requests page 126, 144
candidate names
  assigning to job openings 144
Careers Home page
  applying to job openings 371
catalog, text 1
categories
  interview evaluations 36
Category Setup page 94, 95
Certificate of Eligibles report
  description 414
  generation 212
certificates
  adding 168
  entering 180
  entering job opening requirements 139
  updating 168
Change Applicant Status - Select New Applicant Status page 326
channels
  setting up 87
  understanding 341
checklists
  creating 316
  understanding 315
citizenship
  adding 185
  updating 185
citizenship information
  entering 195
clauses, contract 250
Clone Job Opening page 155
cloning job openings
  cloning 155
  understanding 154
Comments page 218
comments, submitting xxvi
common elements xxvi
community background information
  understanding 46
companies
  assigning to job openings 126
company locations
  adding additional to job openings 143
  adding to recruiting locations 16
  assigning to job opening 135
Company page 106, 108
competencies
  adding 169
  assigning 149
  editing 309
  entering 181
  entering job opening requirements 140
  updating 169
competitive statuses
  assigning 211
component types
  adding to components 39
  creating 39
  understanding 38
components
  creating 39
  understanding 38
configuration files 88
Confirm Referral - Referral Cancelled page 371
Confirm Referral - Submit Confirmation page 371
Confirm Referral page 371

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Confirm Referral—Access page 371
contact information xxvi
  entering 165
  understanding 165
contact methods
  setting up types 22
Contact Methods page 22
contact notes
  understanding 304
  viewing history 305
Contact Setup page 106
contacts
  assigning to sources 113
  defining information for 106
  defining method types 22
Contacts - Contact Setup page 106
Contacts page 106, 113
contacts, recruitment
  selecting on job openings 136
continuous job opening
  definition 121
continuous job openings
  activating approvals 10
  assigning to job openings 126
  defining default template 9
  understanding 124
continuous job postings
  selecting on recruitment templates 62
Contract Clause page 248, 250
Contract Status/Content page 248
contracts
  defining basic information 248
  defining contract clauses 250
  defining signature dates and probation information 252
  understanding 247
correspondence
  sending 320, 322
counters 12
Country Specific page 47, 49
Create Job from Position (HRS_CRJOB) process
  running 153
  understanding 152
Create Job Openings from Positions page 153
Create New List page 311, 312
Criteria page - Employee Referral Program 366
cross-references xxv
Customer Connection website xxii

D

data mapping
  creating assignments 94
  mapping keys 98
  mapping postal data 100, 101
  mapping unmapped data 97
  mapping values 99
  setting up categories 95
  understanding 92
  viewing key lists 96
  viewing value lists 96
Datamapping Setup - Assigned Mapping Setup page 94
Datamapping Sync process 92
dates
  signature 252
defaults
  recruiting 7
  system 6
Define Competency Points page 126, 149
departments
  assigning to job openings 126
disabilities
  entering 195
Disposition Details page 298, 301
dispositions
  changing for applicants 301
  making final recommendations 226
  viewing for applicants 298
documentation
  printed xxii
  related xxii
  updates xxii
Duplicate Applicant Merge (HRS_DUPE_MRG) process
  running 335
  understanding 329
duplicate applicants
  defining search criteria 334
  initiating process 332
  merging 335
  understanding 329

E

Edit Bank Account page 185
Edit Citizenship page 185
Edit Honors and Awards page 169

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Edit Languages page 168
Edit Licenses and Certificates page 168
Edit Memberships page 169
Edit National ID page 185
Edit Primary Education page 168
Edit Primary List Information page 311, 314
Edit Reference Details page 183
Edit Secondary Education page 168
Edit Visa Permit Details page 185
Edit Work Experience page 168
education
  entering job opening requirements 139
  entering primary 180
  entering secondary 180
Effects of Status Change page 78, 82
eligibility information
  entering 185
Eligibility Overrides page 379
Eligibility page - Administer Referrals 379, 380
eligibility rules
  creating SQL rules 361
  naming 360
  processing 372, 376
email
  sending 320, 322
email accounts, resume
  processing emails 115
  selecting resumes 118
  setting up 114, 116
  understanding 114
  viewing lists 117
email addresses
  preferred 320
Email Checking Process 115
Email List page 116, 117
Email Setup page 116
Employee Eligibility Rule page 360
employee eligibility rules
  creating SQL rules 361
  naming 360
  processing 372, 376
Employee Eligibility Rules page 359, 360
Employee Referral Program 360
Employee Referral Program - Criteria page 360
Employee Referral Program - Rules page 360
Employee Referral Program (HRS_ERP_MAIN) process
  running 376
  understanding 372
employee referral programs
  administering hot jobs 392
  approving awards 387
  associating to job openings 135
  creating 365
  defining additional criteria 366
  defining award schedules 364
  defining awards 362
  defining eligibility rules 360
  entering referrals manually 179
  overriding award details 382
  overriding awards 377
  overriding duplicate referrals 385
  overriding employee eligibility 380
  overview 357
  paying awards 387
  processing eligibility and awards 372, 376
  selecting eligibility and award category rules 367
  selecting on recruitment templates 62
  setting up 357
  setting up award schedules 364
  setup overview 358
  understanding payment statuses 374
  viewing awards 381
  viewing eligibility by application 384
  viewing referral summaries 379
Employee Referral Programs page - Employee Referral Program 365
Employee Referral Programs page - Process Referral Programs 376, 390
employee referrals 357
  See Also employee referral programs
  understanding 369
employee verification
  activating 10
  processing 256
  reviewing results 257
  understanding 253
employment history
  entering 180
Enter Primary Job Opening page 126
Evaluate Competencies - View Evaluation Detail page 309
Evaluation Rating Comments page 223

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evaluations, interview
completing 223
creating categories 36
creating interview types 37
creating ratings 37
sending reminders 224
setting up templates 57
specifying default template 9
understanding 222
understanding setup 36
expenses
adding to job openings 267, 270
external job postings
assigning titles to job openings 126, 142, 149
defining days to display 10
managing 276
posting, updating, unposting 276
reviewing integration log 279
reviewing posting history 278
searching for 273
setting up 18
External Posting History page 276, 278
external trainees
adding 328
enabling search/match functionality 10
understanding 326
extractors, *See* resume extractors

F

features 1
files, configuration 88
final recommendations 225
Find Applicant Duplicates (HRS_DUPE_PRC) process
running 334
understanding 329
Find Applicants page 215, 223, 226, 228, 234, 246, 248, 255, 283, 284, 288
Find Duplicate Applicants page 332, 334
Find Email Address page 317, 319
Find Job Openings page 155, 202, 260, 265
Forward Applicant page 317
Forward Applicant Preview page 317
forwarding applicants 317
Full Text Vacancy Report 414

G

gender information 48
glossary 417
grades, salary
assigning to job openings 126

H

hire applicants
enabling search/match functionality 10
reviewing search/match results 257
setting up 40
submitting hire requests 255
understanding 253
hiring managers
assigning to job openings 143
creating teams 17
reviewing interview schedules 230
hiring process
enabling search/match functionality 10
reviewing search/match results 257
setting up 40
submitting hire requests 255
understanding 253
honors
adding 169
entering 181
entering job opening requirements 140
updating 169
Hot Job History page 394
hot jobs
administering 393
defining selection criteria 395
naming and describing categories 394
removing selected job openings 396
setting up award schedules 396
understanding 392
Hot Jobs page 394
Hrs Run Letters page 322
HRS_AM process
running 293
HRS_APP_RTE 216
HRS_CRJOB process
running 153
understanding 152
HRS_DM_SYNC process 92
HRS_DUPE_MRG process
running 335
understanding 329
HRS_DUPE_PRC process

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running 334
understanding 329
HRS_ERP_MAIN process
running 376
understanding 372
HRS_FORWARD_APPLICANT 317
HRS_HROI_DRAFT 112, 354, 356
HRS_HROI_EML process 115
HRS_HROI_REJECT 112, 354, 356
HRS_HROI_SUCCESS 112, 354, 356
HRS_HROI_UNRESOLVED 112, 354, 356
HRS_INT_EVAL process
running 225
understanding 224
HRS_INTVW_EVAL_RMNDR 225
HRS_INTVW_SCHED_TEAM 220
HRS_INTVWSCHED_APPL 220
HRS_JOB_AGNT process 295
defining days active 9
running 295
understanding 294
HRS_JSCH_IDX process
running 260
understanding 273
HRS_PRCS_EML process 115
HRS_RESLOAD process
running 348
understanding 346
HRS_SRCH_IDX process
running 283
HRS_UPDATE_REFERENCES 184
human resources
selecting recruiting data to transfer 40

I

ID numbers
specifying system assigned numbers 10
identification numbers
specifying system assigned numbers 10
identity information
entering 185
IDs
specifying system assigned numbers 10
implementation
defaults 6
recruiting defaults 7
Setup Manager 3
Inbound Map page 94, 100
incoming messages
job postings 278
reviewing 279
indexes
applicant 283
external job postings 260, 273
Insert additional approver or reviewer page 159, 160, 242, 244
installation
defaults 6
recruiting defaults 7
Setup Manager 3
installation defaults 7
Installation table 6
integration
autoscreening setup 102
background screeners setup 87
data mapping 91
job board setup 86
OIF overview 85
Payroll for North America 387
recruitment sources 103
resume email accounts 114
resume extractor setup 86
transaction log 119
vendor setup 88
integration log
managing external job postings 279
Integration Log page 119
Integration Outgoing Messages page 119
integration point
employee referral programs 389
integration transaction log
reviewing 119
integrations
overview 3
interested parties
adding to applicants 306
assigning to job openings 143
creating teams 17
internal recruitment type
assigning to job openings 135
internet applicant
reporting compliance 413
Interview Calendar page 228, 230
interview calendars 230
Interview Details - Interview Evaluation page 223
Interview Evaluation Category page 36
Interview Evaluation Ratings page 36, 37

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Interview Evaluation Reminder (HRS_INT_EVAL) process
running 225
understanding 224
Interview Evaluation Reminder page 225
Interview Evaluation Template page 58
interview evaluation templates
creating 58
defining default template 9
selecting on recruitment templates 62
understanding 57
interview evaluations
completing 223
creating categories 36
creating interview types 37
creating ratings 37
reviewing 228
sending reminders 224
setting up templates 57
specifying default template 9
understanding 222
understanding setup 36
Interview Schedule page 218
interview schedules
reviewing calendars 230
reviewing for applicants 228
understanding 228
interview types 37
Interview Types page 36, 37
Interviewer Availability page 218
interviewers
assigning to job openings 143
creating teams 17
interviews
completing evaluations 222
making final recommendations 225
reviewing schedules 228
scheduling 217
sending reminders 224
setting up 9, 35
setting up templates 57
Ireland
community background information 46, 49

J

Japan
tracking selectees 296
Job Agent (HRS_JOB_AGNT) process 9, 295
running 295
understanding 294
job agents
defining days active 9
defining maximum number 9
running 294
job applications
creating 167, 309
editing 309
entering 169
entering details 170
setting up attachments 20
viewing 309
Job Approvals page 159
job boards
posting job openings 276
reviewing posting history 278
setting up 86
setting up vendors 88
understanding integration 85
Job Boards - Manage External Postings page 276
Job Code and Position Audit report 414
job codes
assigning to job openings 126
Job Group Movement Analysis page 339
Job Group Movement Analysis report 414
job index
building 260
understanding 273
job offers
activating approvals 10
adding approvers 244
approving 243
creating 234
editing and deleting 244
setting up 38
setting up component types 39
understanding 233
understanding approval process 238
viewing pending approvals 242
Job Opening - Activity & Attachments page 265, 267
Job Opening - Job Approvals page 159
Job Opening - Job Opening Details page 265, 270
Job Opening - Job Opening Screening Criteria page 145
Job Opening - Manage Applicants - View Applicants page 265

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Job Opening - Manage Applicants page 265
Job Opening - Screening Results: View Screening Results page 211
Job Opening Cost Analysis report 415
Job Opening page 126, 128, 155, 202
job opening posting templates
creating 53
selecting on recruitment templates 62
understanding 53
Job Opening Screening Criteria page 126
Job Opening Status Listing report 415
job opening statuses
overriding 135
Job Opening Template Descr page 51
Job Opening Template Structure page 51
job opening templates
defining 51
defining defaults 9
prerequisites for set up 51
selecting on recruitment templates 62
understanding 50
job openings
activating multiple job codes 10
approving 155
browsing 263
candidate name requests 144
changing recruitment template 133
cloning 154
creating 124
creating from open positions 152
creating postings 149
denying 160
details, reviewing 270
entering details 128
entering primary information 126
expenses 270
external posting management 276
linking applicants 179, 324
managing 259, 264
notes 269
pushing back 160
recruiting locations 135
reviewing activity 267
reviewing applicants linked to 265
screening criteria, adding 145
setting up 15
templates 50
understanding 124
viewing pending approvals 159
job posting searches
building the job index 260
entering criteria 274, 275
reviewing results 275
understanding 273
job posting templates
creating 53
understanding 53
job postings
assigning titles to job openings 126, 142, 149
defining days to display 10
managing 276
posting, updating, unposting 276
reviewing integration log 279
reviewing posting history 278
searching for 273
setting up 18
job requirements
assigning to job openings 128
Job Requisitions page 394, 396
job search agent
prerequisites 295
running 294
setting up 9
Job Search Agent page 295
JobAgentNotification 294
JobOfferApproval 399
JobOfferApproved 400
JobOfferDeny 400
JobOfferError 401
JobOfferEscalation 401
JobOfferReview 402
JobOfferTermination 402
JobOpeningApproval 403
JobOpeningApproved 403
JobOpeningDeny 404
JobOpeningError 404
JobOpeningEscalation 405
JobOpeningReview 405
JobOpeningTermination 406

K

Key Data Mapping page 94, 98
Key List page 94, 96

L

languages
adding 168

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entering 180
entering job opening requirements 139
updating 168
Last Assigned Ids page - Recruiting Installation 10
letters
job offers 234
setting up 22
levels, screening
adding criteria 145
assigning competency points 149
reviewing results 208
reviewing scoring details 210
running 207
setting up 31
understanding 29
library, posting description
creating 19
defining posting types 19
understanding 18
licenses
adding 168
entering 180
entering job opening requirements 139
updating 168
Link to Job Opening - Select Job Opening page 325
Link to Job Opening page 325
linking applicants 324
to job families 179
lists, applicant
adding applicants 315
creating 312
editing 314
managing 313
understanding 310
viewing 311
lists, permission 409
Load Resume - Prepare Load Parameters page 348
Locations page 126, 143
locations, company
adding additional to job openings 143
adding to recruiting locations 16
assigning to job opening 135
locations, recruiting
adding additional to job openings 143
assigning to job opening 135
defining 16
log, integration
managing external job postings 279
log, transaction
reviewing 119

M

Manage Applicant - Applicant Activity - Current Status page 298
Manage Applicant - Applicant Activity - Expenses page 298
Manage Applicant - Applicant Activity - Interview Schedule/Evaluation page 298
Manage Applicant - Applicant Activity: Current Status page 298
Manage Applicant - Applicant Activity: Interview Schedule/Evaluation page 228
Manage Applicant - Applicant Checklist page 316
Manage Applicant - Applicant Data - Applications & Resumes page 309
Manage Applicant - Applicant Data page 309
Manage Applicant - Contact Notes page 305
Manage Applicant - Disposition Details page 242, 243
Manage Applicant - Disposition Details: Interview page 226
Manage Applicant - Disposition Details: Offer page 244
Manage Applicant - Prepare For Hire page 255
Manage Applicant - Prepare Job Offer page 234
Manage Applicant page 246, 248
Manage Applicants - Pre-employment Check page 246
Manage Hire Setup - Person page 41
Marketing page 106, 109
memberships
entering 169, 181
entering job opening requirements 140
updating 169
merit promotion recruitment type
assigning to job openings 135
multiple jobs
activating 10
assigning codes to job openings 137
My Referrals page 371

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N

nation ID
  adding 185
  updating 185
national IDs
  entering 194
noncompetitive statuses
  assigning 211
notes xxv
  adding to job openings 267, 269
  understanding 304
  viewing history 305
notifications
  delivered templates 406
  delivered workflows 399
  HRS_APP_RTE 216
  HRS_FORWARD_APPLICANT 317
  HRS_HROI_DRAFT 112, 354, 356
  HRS_HROI_REJECT 112, 354, 356
  HRS_HROI_SUCCESS 112, 354, 356
  HRS_HROI_UNRESOLVED 112, 354, 356
  HRS_INTVW_EVAL_RMNDR 225
  HRS_INTVW_SCHED_TEAM 220
  HRS_INTVWSCHED_APPL 220
  HRS_UPDATE_REFERENCES 184
  JobOfferApproval 399
  JobOfferApproved 400
  JobOfferDeny 400
  JobOfferError 401
  JobOfferEscalation 401
  JobOfferReview 402
  JobOfferTermination 402
  JobOpeningApproval 403
  JobOpeningApproved 403
  JobOpeningDeny 404
  JobOpeningError 404
  JobOpeningEscalation 405
  JobOpeningReview 405
  JobOpeningTermination 406

O

OFCCP compliance 268
Offer Component page 39
Offer Component Type page 39
offers, job
  adding approvers 244
  approving 243
  creating 234
  editing and deleting 244
  setting up 38
  understanding 233
  understanding approval process 238
  viewing pending approvals 242
OIF 85
  See Also Open Integration Framework (OIF)
open competition recruitment type
  assigning to job openings 135
Open Integration Framework - Integration Log page 119, 276, 279, 352
Open Integration Framework - Pre-Employment Vendor Setup page 90
Open Integration Framework - Vendor Setup page 88
Open Integration Framework (OIF) 341
  See Also integration
  understanding 85, 341, 342
open positions
  creating job openings from 152
Outbound Map page 94, 101
outgoing messages
  job postings 278, 279
overview 1

P

packages, salary
  copying to human resources 258
  creating 252
payment statuses 374
Payroll for North America
  editing rejected awards 392
  paying awards 391
  understanding integration 387
  viewing rejected awards 391
Pending Approvals page 159, 242
PeopleBooks
  ordering xxii
PeopleCode, typographical conventions xxiv
PeopleSoft Enterprise Payroll for North America
  editing rejected awards 392
  paying awards 391
  understanding integration 387
  viewing rejected awards 391
permission lists 409
permits, visa
  entering information 195

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persons of interest
adding 328
enabling search/match functionality 10
understanding 326
POIs, *See* persons of interest
position numbers
assigning to job openings 126
positions
creating job openings from 152
Posting Description Library page 19
Posting Description Type page 19
posting descriptions
creating 19
creating library 19
defining types 19
understanding 18
Posting Information page 126, 149
Posting Template page 53
postings, job
assigning titles to job openings 126, 142, 149
managing 276
posting, updating, unposting 276
reviewing integration log 279
reviewing posting history 278
searching for 273
setting up 18
Pre-employment Check - Pre-employment Check Details page 246, 247
pre-employment checks
requesting 246
reviewing details 247
setting up vendors 88, 90
understanding 245
Pre-Employment Vendor Setup page 88
prerequisites xxi
prescreening questions
assigning to job openings 140
setting up answer definitions 26
setting up question definitions 27
setting up question set definitions 27
understanding 24
primary education
adding 168
entering 180
updating 168
printed documentation xxii
priority placement
adding 169
assigning to job openings 136
editing 181
setting up 34
understanding 30
Priority Placement page 31, 34
probation information 252
Process Awaiting Email process 115
Process Duplicate Applicants page 332
processes
resume extraction 343
processes, Application Engine
Create Job from Position (HRS_CRJOB) 152, 153
Datamapping Sync (HRS_DM_SYNC) 92
Duplicate Applicant Merge (HRS_DUPE_MRG) 329, 335
Email Checking (HRS_HROI_EML) 115
Employee Referral Program (HRS_ERP_MAIN) 372, 376
Find Applicant Duplicates (HRS_DUPE_PRC) 329, 334
Interview Evaluation Reminder (HRS_INT_EVAL) 224, 225
Job Agent (HRS_JOB_AGNT) 9, 294, 295
Process Awaiting Email (HRS_PRCS_EML) 115
Resume Load Process (HRS_RESLOAD) 346, 348
Run Automatch Search (HRS_AM) 293
Verity Applicant Index Build (HRS_SRCH_IDX) 283
Verity Job Posting Index Build (HRS_JSCH_IDX) 260, 273
processes, business 1
products
selecting on Installation table 6
Products page 6
proxy
defining contact information 106
setting up 114
understanding 342
viewing details for 308
Proxy Details page 305, 308

Q

Question Answers page 26
Question Definition page 26, 27

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question definitions 27
Question Set Definition page 26, 27
question set definitions 27
questionnaires
assigning to job openings 140
overview 25
setting up 26
setting up answer definitions 26
setting up question definitions 27
setting up question set definitions 27
questions, screening
assigning to job openings 140
setting up answer definitions 26
setting up question definitions 27
setting up question set definitions 27

R

ranking
assigning to job openings 141, 142
ranking applicants
ranking 212
Rate Applicant page 204
ratings
creating for interview evaluations 37
recommendations, final 225
records
merging duplicates 329
Recruiter Roles page 16, 17
recruiters
assigning to job openings 142
creating teams 17
defining roles 17
reviewing interview schedules 230
Recruiting Installation - Installation Options page 7
Recruiting Installation - Last Assigned Ids page 7
recruiting locations
adding additional to job openings 143
assigning to job opening 135
defining 16
Recruiting Locations page 16
recruiting products
selecting on Installation table 6
recruiting statuses
effects of status changes 68
how to set up 65
setting up 77
types of 65
understanding 65
recruiting teams
assigning to job openings 142, 143
creating 17
recruiting templates
interview evaluation 57
job opening 50
job opening posting 53
overview 43
recruitment 60
screening 55
recruiting vendors, *See* vendors
Recruitment Area Rules page 78, 80
recruitment contacts
assigning to sources 113
defining 106
selecting on job openings 136
recruitment letters
setting up 22
recruitment sources
defining company details 108
defining contacts 113
defining marketing details 109
defining recruiting contacts 106
defining vendor details 110
selecting source types 108
understanding 104
Recruitment Template page 61
recruitment templates
assigning segmentation values 63
changing on job openings 133
creating 61
defining defaults 9
understanding 60
recruitment types
assigning to job openings 135
Refer Friend - Choose Resume page 371
Refer Friend - Contact Details page 371
Refer Friend - Enter Resume Text page 371
references
adding 183
requesting 183
understanding 182
updating 183
Referral Administration page 379
Referral Award Approval page 390
Referral Award Details page 379, 382, 390, 392
referral sources
specifying for applicants 179

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referrals 357
See Also employee referral programs
Rejected Awards page 390, 391
related documentation xxii
reminders, interview 224
reports
Adverse Impact Analysis (UK) 413
Adverse Impact Analysis (USA) 413
Applicant Summary by Job 413
Applicant Summary by Source 413
Candidate Evaluations List 414
Candidate Listing 414
Certificate of Eligibles 414
Full Text Vacancy Report 414
Job Code and Position Audit 414
Job Group Movement Analysis 414
Job Opening Cost Analysis 415
Job Opening Status Listing 415
overview 413
Salary Package Model 415
Vacant Budgeted Positions 415
requirements, job
assigning to job openings 128
resume email accounts
processing emails 115
selecting resumes 118
setting up 114, 116
understanding 114
viewing lists 117
resume extraction
specifying default extractors 15
resume extractors
extracting data 343
loading resumes 346, 349
managing resumes 351
setting up 86
setting up vendors 88
specifying for sources 113
understanding channels 341
understanding integration 85
Resume Load Process (HRS_RESLOAD)
running 348
understanding 346
resume management, *See* resumes
Resume Management - Select Resume page 352
Resume Management Details page 352, 354
resume templates
community background information 46, 49
defining basic information 47
defining for sites 14
defining pages and sections 47
delivered sections 45
selecting and merging 45
selecting on recruitment templates 62
understanding 44
resumes
adding for applicants 176
extracting data 343
loading 346
managing 351, 352
printing 177
setting up email accounts 114
setting up extraction 86
setting up templates 44
statuses 112, 344, 350, 353
understanding channels 341
viewing 355
viewing details 354
viewing for applicants 298, 300
resumes statuses
assigning to loaded resumes 350
specifying for sources 112
understanding 344
viewing 350, 353
Review Duplicate Applicants page 332, 335
Review Duplicate Referrals page 379, 385
Review Referral page 371
reviewers
adding to job offers 244
adding to job openings 160
roles
delivered 409
recruiters 17
Route Applicant - Route Applicant page 215
routing applicants 214
Rule SQL page - Award Category Rules 359, 363
Rule SQL page - Employee Eligibility Rules 359, 361
rules
award categories 374, 376
employee eligibility 372, 376

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employee eligibility and award category 367
Rules page - Employee Referral Program 367
Run Automatch Search (HRS_AM) process running 293
Run Automatch Search Agent page 283, 293

S

salary grades
assigning to job openings 126
salary information
assigning to job openings 138
Salary Package Model report 415
salary packages
copying to HR 258
copying to human resources 258
creating 252
Save Search page 283, 293
saved applicant searches
entering criteria 293
saved searches
audit trail 268
Saved Searches page 283
schedules
defining for hot jobs 396
schedules, interview
reviewing calendars 230
reviewing for applicants 228
understanding 228
Screen Applicants - Rank Applicants page 212
Screen Applicants - Rate Applicant page 202
Screen Applicants - View All Applicants page 202, 207
screeners, *See* background screeners
screening
adding competency points to screening criteria 149
adding criteria to screening levels 145
assigning competitive and noncompetitive statuses 211
setting up 29
Screening Applicants - Screening Details page 210
screening criteria
adding to job openings 145
assigning competency points 149
assigning to job openings 142
Screening Criteria page 202, 206
Screening Definition page 31
screening definitions
setting up 31
understanding 29
screening levels
adding criteria 145
assigning competency points 149
reviewing results 208
reviewing scoring details 210
running 207
setting up 31
understanding 29
Screening Levels page 202, 205
screening questions
assigning to job openings 140
overview 25
setting up answer definitions 26
setting up question definitions 27
setting up question set definitions 27
Screening Results - View Screening Results page 208
Screening Template page 55
screening templates
creating 55
selecting on recruitment templates 62
understanding 55
Search Postings - Basic Search page 274
Search Results page 255, 328, 329
search/match
adding persons of interest 327, 329
enabling 10
hiring process 253, 256
reviewing results 257
searches, *See* applicant searches, job opening searches
external job postings 273
secondary education
adding 168
entering 180
updating 168
security 1
segmentation
assigning to recruitment templates 63
defining default type 8
Segmentation Values page 61, 63
Select Applicant List page 311, 315
selectees, tracking 296

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Selection page - Hot Job Administration 394, 395
Send Correspondence page 322
Setup Manager 3
Setup Veterans Preference page 31, 33
Signature Date/Probation Info page 248, 252
signature dates 252
site IDs, *See* sites
Site Setup page 13, 14
sites
  defining default 9
  loading resumes 349
  setting up 14
  specifying for sources 109, 110
  understanding 12
Source Setup page 106, 108
sources
  defining company details 108
  defining contacts 113
  defining marketing details 109
  defining vendor details 110
  loading resumes 350
  selecting source types 108
  understanding 104
SQL
  award categories 363
  eligibility rules 361
  viewing 359, 360, 394
staffing information
  assigning to job openings 137
standard requisition
  definition 121
standard requisitions
  activating approvals 10
  assigning to job openings 126
  defining default template 9
  selecting on recruitment templates 62
  understanding 124
Status Successors page 78, 81
Status/Reason Definition page 78
statuses 65
  See Also recruiting statuses
  changing for applicants 326
  competitive 211
  noncompetitive 211
  overriding job opening 135
  payment 374
  Resume Load Process 349
  resumes 112, 344, 350, 353
  selecting for applicants 166
suggestions, submitting xxvi

T

Talent Acquisition Manager
  activating 6
teams
  creating 17
Teams page 16, 17
Template Definition page 47
Template Sections page 47
templates
  defining defaults 9
  delivered notifications 406
  recruiting 43
templates, resume
  community background information 46, 49
  defining basic information 47
  defining for sites 14
  defining pages and sections 47
  delivered sections 45
  selecting and merging 45
  understanding 44
terms 417
tests
  entering job opening requirements 140
text catalog 1
tie breakers
  applying 212
  candidate names 144
tracking applicants 296
trainees, external
  adding 328
  enabling search/match functionality 10
  understanding 326
transaction log
  reviewing 119
transfer data to HR
  set up 40
typographical conventions xxiv

U

Unmapped Data page 94, 97

V

Vacant Budgeted Positions report 415
Value Data Mapping page 94, 99
Value List page 94, 96

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Vendor page 106, 110
Vendor Setup page 88
vendors
defining pre-employment settings 90
linking to recruitment sources 112
loading configuration files 88
setting up background screeners 87
setting up job boards 86
setting up resume extractors 86
understanding integration 85
understanding setup steps 88
verification, employee
activating 10
processing 256
reviewing results 257
understanding 253
Verity Applicant Index Build (HRS_SRCH_IDX) process
running 283
Verity Job Posting Index Build (HRS_JSCH_IDX) process
running 260
understanding 273
veterans preference
setting up 33
understanding 29
View Candidate XML page 352
View Email Message/Attachments page 116, 118
View Evaluation Detail page 169
View Job Posting page 274
View SQL page 359, 360, 394
visa permits
adding 185
entering information 195
updating 185
visas
entering information 195
visual cues xxv

W

warnings xxv
work experience
adding 168
entering 180
entering job opening requirements 139
updating 168
workflow
delivered 399
JobOfferApproval 399
JobOfferApproved 400
JobOfferDeny 400
JobOfferError 401
JobOfferEscalation 401
JobOfferReview 402
JobOfferTermination 402
JobOpeningApproval 403
JobOpeningApproved 403
JobOpeningDeny 404
JobOpeningError 404
JobOpeningEscalation 405
JobOpeningReview 405
JobOpeningTermination 406
works council
activating approvals 10
adding to job opening templates 50, 51
selecting IDs on job offers 236
selecting on job openings 137
setting up 241
understanding approval process 238

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