
PeopleSoft Enterprise Talent Acquisition Manager 9.1 PeopleBook

November 2010

Copyright © 1988, 2010, Oracle and/or its affiliates. All rights reserved.

Trademark Notice

Oracle is a registered trademark of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

License Restrictions Warranty/Consequential Damages Disclaimer

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

Warranty Disclaimer

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

Restricted Rights Notice

If this software or related documentation is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS

Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, duplication, disclosure, modification, and adaptation shall be subject to the restrictions and license terms set forth in the applicable Government contract, and, to the extent applicable by the terms of the Government contract, the additional rights set forth in FAR 52.227-19, Commercial Computer Software License (December 2007). Oracle USA, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

Hazardous Applications Notice

This software is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications which may create a risk of personal injury. If you use this software in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy and other measures to ensure the safe use of this software. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software in dangerous applications.

Third Party Content, Products, and Services Disclaimer

This software and documentation may provide access to or information on content, products and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third party content, products and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third party content, products or services.

Contents

Preface

| | |
|---|------------|
| PeopleSoft Enterprise Talent Acquisition Manager Preface | xxi |
| PeopleSoft Products | xxi |
| PeopleSoft Enterprise HRMS Application Fundamentals | xxi |
| PeopleBooks and the PeopleSoft Online Library | xxi |

Chapter 1

| | |
|--|----------|
| Getting Started with Talent Acquisition Manager | 1 |
| Talent Acquisition Manager Overview | 1 |
| Talent Acquisition Manager Integrations | 4 |
| Talent Acquisition Manager Implementation | 4 |

Chapter 2

| | |
|---|----------|
| Defining Installation Options for Recruiting | 7 |
| Understanding Talent Acquisition Manager Setup | 7 |
| Human Resources Foundation Tables | 7 |
| Additional PeopleSoft Human Resource Definitions | 8 |
| PeopleSoft HCM Common Definitions | 9 |
| Recruiting-Specific Setup | 9 |
| Activating Recruiting Applications | 9 |
| Page Used to Activate Recruiting Applications | 10 |
| Selecting PeopleSoft Applications for Your Installation | 10 |
| Setting Up Talent Acquisition Manager Installation Settings | 10 |
| Pages Used to Set Up Talent Acquisition Manager Implementation Defaults | 10 |
| Defining General Settings for Templates, Approvals, and Integrations | 11 |
| Defining Job-Related Settings | 15 |
| Defining Applicant-Related Settings | 17 |
| Selecting Regulatory Regions for Online Job Offers | 20 |
| Specifying Starting Numbers for System-Assigned Numbers | 21 |

Chapter 3

| | |
|---|-----------|
| Setting Up Profile Integration | 25 |
| Understanding Profile Architecture | 25 |
| Choosing the Primary Person Profile Type for Recruiting | 26 |
| Understanding the Primary Person Profile Types | 26 |
| Page Used to Set Up the Primary Person Profile for Recruiting | 27 |
| Setting Up the Primary Profile Types for Recruiting | 27 |
| Configuring Profiles for Recruiting | 28 |
| Understanding Content Type Configuration for Recruiting | 28 |
| Page Used to Configure Profiles for Recruiting Use | 28 |
| Configuring Profiles for Recruiting Use | 29 |
| Setting Up Profile Integration for Job Openings | 31 |
| Understanding Set Up for Profile Integration for Job Openings | 32 |
| Pages Used to Set Up Profile Integration for Job Openings | 33 |

Chapter 4

| | |
|--|-----------|
| Setting Up Recruiting Statuses | 35 |
| Understanding Recruiting Statuses | 35 |
| Recruiting Status Areas | 35 |
| Recruiting Status Setup | 37 |
| Delivered Status Codes and Reasons | 39 |
| Delivered Status Change Effects | 41 |
| Setting Up Recruiting Statuses | 48 |
| Pages Used to Set Up Recruiting Statuses | 49 |
| Defining Statuses and Reasons Codes | 49 |
| Setting Up Rules for Status Areas | 52 |
| Defining Successors | 53 |
| Defining the Effects of Status Changes | 54 |

Chapter 5

| | |
|--|-----------|
| Setting Up Screening Processes | 57 |
| Understanding Screening Setup | 57 |
| Screening Criteria | 57 |
| Processing Rules | 60 |
| Setting Up Screening Questions | 61 |
| Understanding Screening Question Setup | 61 |
| Pages Used to Set Up Questionnaires | 64 |

| | |
|---|----|
| Setting Up Answer Definitions | 64 |
| Setting Up Question Definitions and Default Answer Scores | 65 |
| Setting Up Question Set Definitions | 66 |
| Reviewing Answers to Questions in a Question Set | 68 |
| Making Content Types Available for Screening | 69 |
| Page Used to Configure Content Types for Screening | 70 |
| Configuring Content Types for Screening | 70 |
| Setting Up Screening Level Definitions | 72 |
| Understanding Screening Levels | 72 |
| Understanding Prescreening and Online Screening | 75 |
| Page Used to Set Up Screening Level Definitions | 77 |
| Setting Up Screening Level Definitions | 78 |
| (USF) Setting Up Preference Programs | 81 |
| Understanding Priority Placement Processing | 81 |
| Understanding Veterans Preference Codes | 82 |
| Pages Used to Set Up U.S. Federal Screening Processes | 83 |
| (USF) Setting Up Priority Placement Codes | 84 |
| (USF) Setting Up Veterans Preference Codes | 85 |

Chapter 6

| | |
|--|-----------|
| Setting Up Additional Recruiting Definitions | 87 |
| Setting Up Recruiting Roles and Security | 87 |
| Understanding Recruiting Security | 87 |
| Page Used to Identify Recruiting Roles | 89 |
| Identifying Recruiting Roles | 89 |
| Setting Up Sites | 90 |
| Understanding Sites | 90 |
| Prerequisites | 91 |
| Page Used to Set Up Sites | 91 |
| Setting Up Sites | 91 |
| Setting Up Recruiting Locations | 93 |
| Page Used to Set Up Recruiting Locations | 93 |
| Defining Recruiting Locations | 93 |
| Setting Up the Job Posting Description Library | 94 |
| Understanding the Job Posting Description Library | 95 |
| Pages Used to Set Up the Job Posting Description Library | 95 |
| Defining Posting Description Types | 95 |
| Creating Posting Descriptions | 96 |
| Setting Up Application Attachments | 97 |
| Understanding Attachment Types | 98 |
| Page Used to Set Up Application Attachments | 98 |
| Defining Attachment Types | 98 |

| | |
|---|-----|
| Setting Up Contact Methods | 99 |
| Page Used to Set Up Contact Methods | 100 |
| Defining Contact Method Types | 100 |
| Setting Up Interview Definitions | 101 |
| Understanding Interview Definitions | 101 |
| Pages Used to Set Up Interview Definitions | 101 |
| Creating Interview Types | 102 |
| Creating Interview Evaluation Categories | 102 |
| Creating Interview Ratings | 103 |
| Setting Up Job Offer Components | 103 |
| Understanding Job Offer Setup | 104 |
| Pages Used to Set Up Job Offers | 105 |
| Creating Job Offer Component Types | 105 |
| Entering Job Offer Component Information | 106 |
| Setting Up the Data Transfer to HR | 107 |
| Page Used to Set Up the Data Transfer to HR | 107 |
| Defining Data to Transfer to HR | 107 |

Chapter 7

| | |
|--|------------|
| Setting Up Recruiting Templates | 113 |
| Understanding Recruiting Templates | 113 |
| Setting Up Resume Templates | 115 |
| Understanding Resume Templates | 115 |
| Prerequisites | 122 |
| Pages Used to Set Up Resume Templates | 122 |
| Defining Basic Information for Resume Templates | 123 |
| Defining Resume Template Pages and Sections | 123 |
| (IRL) Defining Requirements for Community Background Information | 126 |
| Defining Prescreening Settings for Applications Without Job Openings | 126 |
| Setting Point Values for Prescreening Questions | 130 |
| Setting Up Job Opening Templates | 130 |
| Understanding Job Opening Templates | 131 |
| Prerequisites | 134 |
| Pages Used to Set Up Job Opening Templates | 134 |
| Entering Identifying Information for Job Opening Templates | 134 |
| Defining Job Opening Template Structure | 135 |
| Setting Up Job Opening Posting Templates | 137 |
| Understanding Job Opening Posting Templates | 138 |
| Prerequisites | 138 |
| Page Used to Set Up Job Opening Posting Templates | 138 |
| Creating a Job Opening Posting Template | 138 |
| Setting Up Screening Templates | 140 |

| | |
|--|-----|
| Understanding Screening Templates | 140 |
| Prerequisite | 140 |
| Page Used To Set Up Screening Templates | 141 |
| Setting Up a Screening Template | 141 |
| Setting Up Interview Evaluation Templates | 144 |
| Understanding Interview Evaluation Templates | 145 |
| Prerequisites | 145 |
| Pages Used to Set Up Interview Evaluation Templates | 145 |
| Creating an Interview Evaluation Template | 146 |
| Selecting Available Status Reasons | 148 |
| Setting Up Recruitment Templates | 149 |
| Understanding Recruitment Templates | 149 |
| Prerequisites | 150 |
| Pages Used to Set Up Recruitment Templates | 150 |
| Linking Templates to Recruitment Templates | 150 |
| Assigning Segmentation Values to Recruitment Templates | 152 |

Chapter 8

| | |
|--|------------|
| Setting Up Recruitment Sources and Third Party Integrations | 155 |
| Understanding Third Party Integrations | 155 |
| The Open Integration Framework | 155 |
| Job Board Setup | 156 |
| Resume Extractor Setup | 157 |
| Background Screener Setup | 158 |
| Setting Up Recruiting Vendors | 158 |
| Understanding How to Set Up Recruiting Vendors | 159 |
| Pages Used to Set Up Recruiting Vendors | 159 |
| Loading a Vendor Configuration File | 159 |
| Configuring Vendors | 160 |
| Defining Settings for Pre-Employment Vendors | 162 |
| Testing Vendor Integration | 163 |
| Setting Up Data Mapping | 164 |
| Understanding Data Mapping | 164 |
| Pages Used to Set Up Data Mapping | 166 |
| Creating Data Mapping Assignments | 167 |
| Setting Up Categories | 167 |
| Viewing Key Lists | 168 |
| Viewing Value Lists | 169 |
| Mapping Unmapped Data | 170 |
| Mapping Keys | 171 |
| Mapping Values | 173 |
| Mapping Inbound Postal Information | 174 |

| | |
|--|-----|
| Mapping Outbound Postal Information | 175 |
| Setting Up Resume Email Accounts | 176 |
| Understanding Resume Email Accounts | 177 |
| Pages Used to Define Resume Email Accounts | 178 |
| Setting Up Resume Email Accounts | 178 |
| Viewing Lists of Emails | 180 |
| Viewing Email Attachments and Selecting Resumes | 180 |
| Setting Up Recruitment Sources | 181 |
| Understanding Recruitment Sources | 181 |
| Prerequisites | 182 |
| Pages Used to Set Up Recruitment Sources | 183 |
| Setting Up Recruiting Contacts | 184 |
| Setting Up Autoscreening Criteria for Vendor Recruitment Sources | 185 |
| Setting Up Recruitment Sources | 186 |
| Defining Settings for Company Recruitment Sources | 187 |
| Defining Settings for Marketing and Employee Recruitment Sources | 188 |
| Defining Settings for Vendor Recruitment Sources | 189 |
| Defining Contacts for a Recruitment Source | 192 |
| Reviewing the Integration Transaction Log | 193 |
| Pages Used to Review the Integration Transaction Log | 193 |
| Reviewing the Integration Transaction Log | 193 |
| Reviewing Outgoing Message Details | 194 |

Chapter 9

| | |
|--|------------|
| Understanding Approval Delegation in Talent Acquisition Manager | 197 |
| Talent Acquisition Manager Delegations | 197 |
| The Delegation Framework | 198 |
| Delegation Terminology | 198 |
| Delegation Options | 199 |
| Delegation Framework Pages | 199 |
| Delivered Delegation Definitions for Recruiting | 200 |
| Delivered Workflow Transactions | 200 |
| Delivered Permission Lists and Roles for Delegation | 200 |
| Installation Settings | 201 |
| Delivered Delegation Transactions | 201 |
| The Delegation Process | 202 |

Chapter 10

| | |
|------------------------------------|------------|
| Creating Job Openings | 205 |
| Understanding Job Openings | 205 |

| | |
|---|-----|
| Job Opening Data | 205 |
| Job Opening Creation Methods | 208 |
| Understanding Profile Integration for Job Openings | 208 |
| Profile Architecture | 209 |
| Profile Integration Options | 210 |
| Full Profile Integration | 211 |
| Limited Profile Integration | 215 |
| Entering Primary Job Opening Information | 215 |
| Understanding Primary Job Opening Information | 216 |
| Pages Used to Enter Primary Job Opening Information | 217 |
| Entering Primary Job Opening Information | 218 |
| Reviewing Profile Data and Choosing the Primary Profile | 222 |
| Entering Basic Job Opening Data | 227 |
| Pages Used to Enter Basic Job Opening Data | 228 |
| Entering Basic Job Information | 228 |
| Adding Locations to Job Openings | 236 |
| (USF) Entering Candidate Name Requests | 238 |
| Working With Multiple Job Codes in a Job Opening | 238 |
| Understanding Copying Qualifications To Non-Primary Job Codes | 238 |
| Adding Additional Job Codes to a Job Opening | 239 |
| Copying Job Qualifications to Non-Primary Job Codes | 240 |
| Adding Staffing and Salary Information | 242 |
| Page Used to Add Salary and Staffing Information | 242 |
| Entering Staffing Information | 242 |
| Entering Salary Information | 244 |
| Adding Job Qualifications | 246 |
| Pages Used to Define Job Qualifications | 247 |
| Reviewing Profile Usage | 247 |
| Defining Education and Work Experience Requirements. | 248 |
| Defining Profile-Based Job Qualifications | 249 |
| Adding Content Item Details | 251 |
| Adding Screening Questions to a Job Opening | 252 |
| Pages Used to Add Screening Questions to a Job Opening | 253 |
| Adding Screening Questions to a Job Opening | 253 |
| Viewing Answers to Multiple-Choice Screening Questions | 255 |
| Assigning Evaluators to Open-Ended Screening Questions | 256 |
| Loading Screening Questions from Question Sets | 257 |
| Setting Up Screening for a Job Opening | 258 |
| Understanding Screening Settings in the Job Opening | 258 |
| (USF) Understanding U.S. Federal Screening Setup | 261 |
| Prerequisites | 263 |
| Pages Used to Set Up Screening for a Job Opening | 264 |
| Defining Job Opening Screening Levels | 265 |
| Choosing Screening Levels to Add | 269 |
| Defining Screening Level Rules and Criteria | 270 |

| | |
|---|-----|
| Defining Screening Points | 277 |
| Creating Job Postings | 277 |
| Pages Used to Create Job Postings | 278 |
| Creating Job Postings | 278 |
| Adding Job Posting Details | 279 |
| Identifying Recruiting Team Members for a Job Opening | 282 |
| Understanding Recruiting Teams | 283 |
| Pages Used to Identify Recruiting Team Members for a Job Opening | 283 |
| Setting Up Recruiting Teams | 284 |
| Identifying Recruiting Team Members for a Job Opening | 284 |
| Creating Job Openings from Positions or from Other Job Openings | 287 |
| Understanding Alternative Job Creation Methods | 287 |
| Pages Used to Create Job Openings from Positions or from Other Job Openings | 289 |
| Creating Job Openings from Open Positions | 290 |
| Cloning a Job Opening | 291 |
| Approving Job Openings | 291 |
| Understanding Job Opening Approvals | 291 |
| Pages Used to Approve Job Openings | 295 |
| Viewing Pending Approvals | 296 |
| Approving a Job Opening | 296 |
| Adding Another Approver or Reviewer | 298 |

Chapter 11

| | |
|---|------------|
| Entering Applicant Data | 299 |
| Understanding Applicant Records | 299 |
| Applicant Record Creation | 299 |
| Applicant Data | 300 |
| Job Applications | 301 |
| Understanding Profile Information in Job Applications | 303 |
| Common Elements on Applicant Data Pages | 305 |
| Entering Contact Information | 305 |
| Page Used to Enter Contact Information | 305 |
| Entering Contact Information Details | 305 |
| Entering Job Applications | 309 |
| Pages Used to Enter Application Details | 310 |
| Review an Applicant's Applications | 312 |
| Entering Application Details | 313 |
| Entering Content Item Details | 327 |
| Entering References | 330 |
| Pages Used to Enter References | 330 |
| Reviewing and Requesting References | 330 |
| Entering Reference Details | 331 |

| | |
|--|-----|
| Entering Applicant Eligibility and Identity Information | 332 |
| Pages Used to Enter Applicant Eligibility and Identity Information | 333 |
| Adding Eligibility and Identity Information | 334 |

Chapter 12

| | |
|--|------------|
| Searching for Applicants | 339 |
| Understanding Applicant Searches | 339 |
| Building Search Collections for Applicant Searches | 340 |
| Understanding Search Collections | 340 |
| Pages Used to Build Search Collections | 343 |
| Building Applicant Search Collections | 344 |
| Building Additional Collections for Profile Match Searching | 347 |
| Performing Applicant and Profile Searches | 347 |
| Understanding Profile-Based Searching in the Advanced Keyword Search | 348 |
| Common Elements Used to Search for Applicants | 348 |
| Pages Used to Search for Applicants | 349 |
| Performing Basic Database Searches | 350 |
| Performing Simple Keyword Searches | 354 |
| Performing Advanced Keyword Searches | 358 |
| Performing Profile Searches | 363 |
| Reviewing Profile Match Details | 367 |
| Using AIRS to Search the Internet for Applicants | 368 |
| Working With Saved Searches | 369 |
| Understanding Saved Searches | 369 |
| Pages Used to Work With Saved Searches | 370 |
| Saving Search Criteria and Automatch Searches | 371 |
| Saving Search Results | 372 |
| Viewing Saved Searches | 373 |
| Running Automatch Saved Searches | 375 |

Chapter 13

| | |
|--|------------|
| Screening and Routing Applicants | 377 |
| Understanding the Screening Process | 377 |
| Prerequisites | 380 |
| Evaluating Answers to Open-Ended Screening Questions | 380 |
| Understanding Open-Ended Question Evaluations | 380 |
| Pages Used to Evaluate Open-Ended Questions | 381 |
| Reviewing Questions to Evaluate | 381 |
| Assigning Scores to Answers | 382 |
| (USF) Running the Priority Placement Process | 383 |

| | |
|---|-----|
| Understanding the Priority Placement Process | 383 |
| Pages Used to Run the Priority Placement Process | 384 |
| Running the Priority Placement Process for One or Many Job Openings | 384 |
| Running the Priority Placement Process from the Context of a Specific Job Opening | 385 |
| Reviewing and Rating Applicants | 385 |
| Understanding Applicant Ratings | 385 |
| Pages Used to Review and Rate Applicants | 386 |
| Reviewing Applicants Linked to Job Openings | 387 |
| Rating Applicants | 389 |
| Running Screening Levels and Applying Results | 392 |
| Understanding Screening Level Processing | 393 |
| Pages Used to Run and Apply Screening Levels | 395 |
| Reviewing Screening Levels | 396 |
| Reviewing and Editing Screening Criteria | 398 |
| Running Screening Levels | 400 |
| Reviewing and Applying Screening Results | 401 |
| Reviewing Score Details for a Screening Level | 404 |
| Reviewing Questionnaire Details | 407 |
| Applying Results | 408 |
| (USF) Ranking Applicants and Generating the Certificate of Eligibles | 408 |
| Understanding The Federal Ranking Process | 408 |
| Pages Used to Rank Applicants and Generate the Certificate of Eligibles | 410 |
| Assigning Competitive and Noncompetitive Statuses | 410 |
| Ranking Applicants | 411 |
| Reviewing Cumulative Score Details | 414 |
| Generating the Certificate of Eligibles | 415 |
| Working With the Certificate of Eligibles | 416 |
| Printing the Certificate of Eligibles | 416 |
| Routing Applicants | 417 |
| Understanding Applicant Routing | 417 |
| Pages Used to Route Applicants | 418 |
| Routing Applicants | 419 |
| Entering Routing Recommendations and a Final Routing Decision | 420 |

Chapter 14

| | |
|---|------------|
| Interviewing Applicants | 423 |
| Maintaining Interview Facilities | 423 |
| Page Used to Maintain Interview Facilities | 423 |
| Maintaining Interview Facilities | 423 |
| Scheduling Interviews | 425 |
| Understanding Applicant Interviews | 425 |
| Understanding Calendar Integration for Interviews | 428 |

| | |
|--|-----|
| Pages Used to Schedule Applicant Interviews | 431 |
| Scheduling Applicant Interviews | 433 |
| Checking Participant Availability | 444 |
| Setting Notifications Options for Interview Changes | 445 |
| Modifying Interview Notification Text | 446 |
| Reviewing and Printing an Interview Summary | 448 |
| Completing Interview Evaluations | 448 |
| Understanding Interview Evaluations | 449 |
| Prerequisites | 450 |
| Pages Used to Complete Interview Evaluations | 450 |
| Creating an Interview Evaluation | 451 |
| Updating a Submitted Evaluation | 454 |
| Finalizing Interviews and Sending Evaluation Reminders | 457 |
| Understanding Interview Finalization and Evaluation Reminders | 457 |
| Page Used to Finalize Interviews and Send Evaluation Reminders | 458 |
| Finalizing Interviews and Sending Evaluation Reminders | 458 |
| Making Final Recommendations | 459 |
| Understanding Final Recommendations | 459 |
| Prerequisite | 459 |
| Page Used to Make Final Recommendations | 460 |
| Making Final Recommendations | 460 |
| Reviewing Interview Schedules and Evaluations | 462 |
| Pages Used to Review Interview Schedules and Evaluations | 463 |
| Reviewing Applicant Interview Schedules and Evaluations | 463 |
| Reviewing Interview Calendars | 466 |

Chapter 15

| | |
|--|------------|
| Making Job Offers | 469 |
| Creating Job Offers | 469 |
| Understanding Job Offers | 469 |
| Prerequisites | 472 |
| Pages Used to Prepare Job Offers | 473 |
| Creating a Job Offer | 473 |
| Attaching Organizational Level Documents | 482 |
| Posting Job Offers to Candidate Gateway | 484 |
| Approving Job Offers | 485 |
| Understanding Job Offer Approvals | 486 |
| Prerequisites | 489 |
| Pages Used to Approve Job Offers | 490 |
| Viewing and Approving Pending Approvals | 490 |
| Approving Job Offers | 491 |
| Adding Another Approver or Reviewer | 493 |

| | |
|---|-----|
| Editing or Deleting Job Offers | 493 |
| Pages Used to Edit or Delete Job Offers | 493 |
| Editing or Deleting Job Offers | 493 |

Chapter 16

| | |
|---|------------|
| Hiring Applicants | 495 |
| Completing Pre-Employment Checks | 495 |
| Understanding Pre-Employment Checks | 495 |
| Prerequisite | 495 |
| Pages Used to Complete Pre-Employment Checks | 496 |
| Submitting Pre-Employment Check Requests | 496 |
| Creating Applicant Contracts | 498 |
| Understanding Applicant Contracts | 498 |
| Prerequisites | 498 |
| Pages Used to Manage Applicant Contracts | 498 |
| Defining Basic Contract Information | 499 |
| Defining Contract Clause Information | 501 |
| Defining the Signature Date and Probation Information | 503 |
| (AUS) Creating Salary Packages | 504 |
| Understanding Salary Packages | 504 |
| Hiring Applicants | 504 |
| Understanding Hiring Applicants | 504 |
| Prerequisites | 507 |
| Pages Used to Hire Applicants | 508 |
| Recording an Accepted Offer | 509 |
| Preparing for Hire | 509 |
| Reviewing Search/Match Results | 512 |
| Withdrawing a Hire Request | 515 |
| (AUS) Copying Salary Packages to Human Resources | 515 |
| Understanding How to Copy Salary Packages to the Human Resources Database | 515 |

Chapter 17

| | |
|--|------------|
| Managing Job Openings | 517 |
| Searching for Job Openings | 517 |
| Understanding Job Opening Searches | 517 |
| Common Elements Used on Job Opening Search Pages | 517 |
| Pages Used to Search for Existing Job Openings | 518 |
| Searching for Job Openings | 518 |
| Browsing for Job Openings | 521 |
| Managing Job Openings | 524 |

| | |
|---|-----|
| Understanding Job Opening Pages | 525 |
| Common Elements Used in This Section | 525 |
| Pages Used to Manage Job Openings | 526 |
| Reviewing Applicants Linked to Job Openings | 527 |
| Reviewing Job Opening Activity | 530 |
| Adding Notes to Job Openings | 533 |
| Adding Expenses to Job Opening | 534 |
| Reviewing Job Opening Details | 535 |
| Printing Job Openings | 535 |
| Understanding Job Opening Printing | 535 |
| Pages Used to Print Job Openings | 536 |
| Selecting Sections to Print | 536 |
| Previewing and Printing Job Opening Details | 538 |

Chapter 18

| | |
|--|------------|
| Managing Job Postings | 541 |
| Building the Job Posting Collections | 541 |
| Understanding the Job Posting Collections | 541 |
| Page Used to Build the Job Posting Collections | 543 |
| Building the Job Posting Collections | 543 |
| Searching for Job Postings | 544 |
| Understanding Job Posting Searches | 544 |
| Prerequisites | 544 |
| Pages Used to Search for Job Postings | 545 |
| Performing Basic Job Posting Searches | 545 |
| Defining Advanced Keyword Searches | 547 |
| Managing External Job Postings | 548 |
| Understanding External Job Postings | 548 |
| Pages Used to Manage External Job Postings | 549 |
| Posting, Updating, and Unposting External Job Postings | 549 |
| Reviewing External Job Posting Transaction History | 551 |
| Reviewing the Integration Log | 552 |
| Posting Jobs to PeopleSoft Services Procurement | 552 |
| Understanding Integration With PeopleSoft Services Procurement | 552 |
| Posting Jobs to PeopleSoft Services Procurement. | 556 |

Chapter 19

| | |
|--|------------|
| Managing Applicants | 557 |
| Understanding Applicant Management | 557 |
| The Manage Applicant Page | 558 |

| | |
|---|-----|
| Actions in the Take Action Field | 559 |
| Processes and Reports | 565 |
| Tracking Applicant Activity | 566 |
| (JPN) Understanding How to Track Selectees for Japan | 566 |
| Pages Used to Track Applicant Activity | 568 |
| Reviewing Applicant Dispositions | 568 |
| Reviewing Disposition Details | 571 |
| Reviewing Interview Schedules and Evaluations | 573 |
| Reviewing Applicant Expenses | 573 |
| Adding Applicant Expenses | 574 |
| Managing Contact Notes | 575 |
| Understanding Contact Notes | 575 |
| Page Used to Manage Contact Notes | 576 |
| Reviewing Contact Notes and Interested Parties | 577 |
| Adding Contact Notes | 578 |
| Reviewing Applicant Data | 580 |
| Pages Used to Review Applicant Data | 581 |
| Reviewing the Application Summary for an Applicant | 581 |
| Reviewing Application Details | 583 |
| Reviewing Questionnaire Details | 583 |
| Linking Applicants to Job Openings | 585 |
| Understanding How to Link Applicants to Job Openings | 585 |
| Pages Used to Link Applicants to Job Openings | 586 |
| Linking Applicants to Job Openings | 586 |
| Printing Application Details | 588 |
| Understanding How to Print Application Details | 588 |
| Pages Used to Print Application Details | 589 |
| Printing a Single Application | 589 |
| Printing Multiple Applications | 590 |
| Sending Correspondence and Recruitment Letters | 591 |
| Understanding the Send Correspondence Action | 591 |
| Understanding Context-Specific Recruitment Letters | 593 |
| Pages Used to Send Correspondence and Recruitment Letters | 596 |
| Sending Ad Hoc Correspondence | 597 |
| Finding Email Addresses | 601 |
| Generating Batch Recruitment Letters | 602 |
| Forwarding Applicants | 602 |
| Understanding Applicant Forwarding | 602 |
| Pages Used to Forward Applicants | 603 |
| Forwarding Applicants | 603 |
| Previewing the Email | 606 |
| Rejecting Applicants | 607 |
| Pages Used to Reject Applicants | 607 |
| Rejecting Applicants | 607 |
| Changing Applicant Statuses | 608 |

| | |
|--|-----|
| Pages Used to Change Applicant Statuses | 608 |
| Changing Applicant Statuses | 609 |
| Managing Applicant Lists | 609 |
| Understanding Applicant Lists | 609 |
| Pages Used to Manage Applicant Lists | 610 |
| Viewing Existing Applicant Lists | 611 |
| Creating Applicant Lists | 612 |
| Managing Applicant Lists | 613 |
| Editing Primary Applicant List Data | 615 |
| Adding Applicants to an Existing List | 616 |
| Creating Applicant Checklists | 616 |
| Understanding Checklists | 616 |
| Pages Used to Create Applicant Checklists | 617 |
| Creating Applicant Checklists | 617 |
| Adding Persons of Interest | 618 |
| Understanding Persons of Interest | 619 |
| Pages Used to Add Persons of Interest | 619 |
| Selecting Person of Interest Types and Adding Persons of Interest | 620 |
| Viewing Search/Match Results | 620 |
| Processing Duplicate Applicants | 620 |
| Understanding Duplicate Applicant Processing | 621 |
| Pages Used to Process Duplicate Applicants | 624 |
| Initiating Duplicate Applicant Processing | 625 |
| Defining Search Criteria and Running the Find Applicant Duplicates Process | 626 |
| Identifying and Merging Duplicate Applicant Records | 628 |
| Manually Merging Applicants from the Target Record | 630 |
| Manually Merging Applicants from the Source Record | 631 |
| Using the Job Search Agent | 631 |
| Understanding the Job Agent Process | 632 |
| Prerequisites | 633 |
| Page Used to Run the Job Agent Process | 633 |
| Running the Job Agent Application Engine Process | 633 |
| Generating Applicant Reports | 633 |
| Pages Used to Generate Applicant Related Reports | 634 |

Chapter 20

| | |
|---|------------|
| Managing Resumes | 635 |
| Understanding Resume Management | 635 |
| Channels | 635 |
| Understanding the Resume Extraction Process | 637 |
| Understanding Resume Statuses | 638 |
| Loading Resumes | 640 |

| | |
|---|-----|
| Understanding the Resume Load Process (HRS_RESLOAD) | 640 |
| Prerequisites | 641 |
| Page Used to Load Resumes | 642 |
| Loading Resumes | 642 |
| Managing Resumes | 645 |
| Understanding Resume Management | 645 |
| Prerequisite | 646 |
| Pages Used to Manage Resumes | 646 |
| Managing Resumes | 646 |
| Viewing Details for Resumes | 649 |

Chapter 21

| | |
|---|------------|
| Managing Employee Referral Programs | 653 |
| Understanding the Employee Referral Program Process | 653 |
| Setting Up Employee Referral Programs | 654 |
| Understanding How to Set Up Employee Referral Programs | 654 |
| Pages Used to Set Up Employee Referral Programs | 656 |
| Naming Employee Eligibility Rules | 658 |
| Creating SQL Statements for Employee Eligibility Rules | 658 |
| Naming Award Category Rules | 660 |
| Creating SQL Statements for Award Category Rules | 661 |
| Defining Award Schedules | 661 |
| Defining Employee Referral Programs | 663 |
| Defining Additional Criteria | 664 |
| Selecting Employee Eligibility and Award Category Rules | 666 |
| Submitting Referrals | 668 |
| Understanding Employee and Applicant Referrals | 668 |
| Pages Used to Submit, Confirm, and Review Referrals | 671 |
| Processing Employee Referrals | 672 |
| Understanding the Employee Referral Program Process | 672 |
| Understanding Payment Statuses | 675 |
| Page Used to Process Eligibility and Awards | 677 |
| Processing Eligibility and Awards | 677 |
| Reviewing and Overriding Referral Awards | 678 |
| Understanding Referral Overrides | 678 |
| Pages Used to View and Override Referral Awards | 678 |
| Viewing Referral Summary Information | 679 |
| Viewing and Overriding Employee Eligibility | 680 |
| Viewing Awards | 682 |
| Overriding Award Details | 683 |
| Viewing Eligibility by Application | 686 |
| Viewing and Overriding Duplicate Referrals | 686 |

| | |
|--|-----|
| Reviewing Eligibility Overrides | 687 |
| Reviewing Award Overrides | 688 |
| Approving and Paying Referral Awards | 688 |
| Understanding Award Approvals | 688 |
| Understanding Paying Awards | 689 |
| Pages Used to Approve and Pay Referral Awards | 691 |
| Approving Referral Awards | 692 |
| Submitting Awards | 693 |
| Viewing Rejected Awards | 694 |
| Editing Rejected Awards | 694 |
| Managing Hot Jobs | 694 |
| Understanding Hot Jobs | 695 |
| Pages Used to Manage Hot Jobs | 696 |
| Naming and Describing Hot Job Categories | 697 |
| Creating SQL Statements to Define Job Opening Selection Criteria | 697 |
| Removing Selected Job Openings from the Hot Job Category | 698 |
| Setting Up Award Schedules | 699 |
| View Hot Job History | 699 |

Appendix A

| | |
|---|------------|
| Delivered Workflows for Talent Acquisition Manager | 701 |
| Delivered Workflows for Talent Acquisition Manager | 701 |
| Job Offer Approval | 701 |
| Job Offer Approved | 702 |
| Job Offer Deny | 702 |
| Job Offer Error | 703 |
| Job Offer Escalation | 704 |
| Job Offer Review | 704 |
| Job Offer Termination | 705 |
| Job Opening Approval | 705 |
| Job Opening Approved | 706 |
| Job Opening Deny | 707 |
| Job Opening Error | 707 |
| Job Opening Escalation | 708 |
| Job Opening Review | 708 |
| Job Opening Termination | 709 |
| Delivered Notification Templates | 710 |

Appendix B

| | |
|--|------------|
| Delivered Permission Lists and Roles for Talent Acquisition Manager | 713 |
|--|------------|

Delivered Permission Lists and Roles 713

Appendix C

PeopleSoft Talent Acquisition Manager Reports 717

Talent Acquisition Manager Reports: A to Z 717

Index 721

PeopleSoft Enterprise Talent Acquisition Manager Preface

This preface discusses:

- PeopleSoft products.
- PeopleSoft Enterprise HRMS Application Fundamentals.

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 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 Application Fundamentals PeopleBook*.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Understanding HRMS"

PeopleBooks and the PeopleSoft Online Library

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

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.

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

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

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

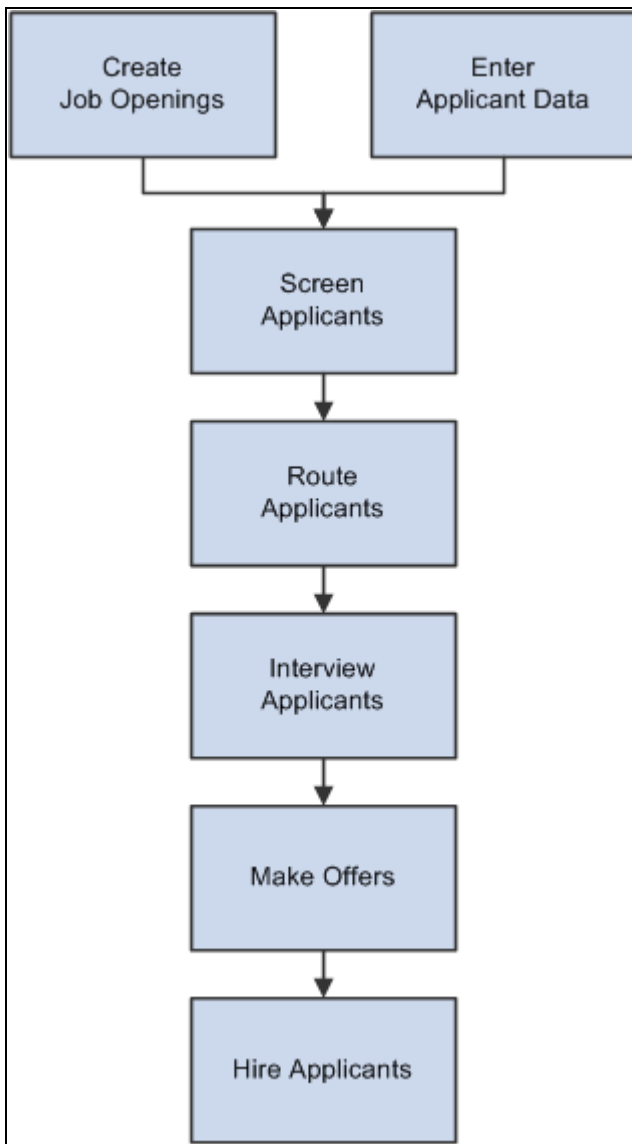
Talent Acquisition Manager is a complete, integrated system that enables organizations to effectively manage workforce acquisition across all employment categories. Whether you have a few resumes to fill hard-to-find positions or you have plenty of resumes but top candidates are scarce, Talent Acquisition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

Primary Recruiting Process Flow

With this application, you can:

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

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



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

Additional Recruiting Functionality

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

- Create and manage employee referral programs.

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

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

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

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

- Secure access to data.

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

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

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

See [Chapter 6, "Setting Up Additional Recruiting Definitions," Understanding Recruiting Security, page 87.](#)

Recruiter Alerts and Other Recruiting Pagelets

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

- Recruiter Alerts

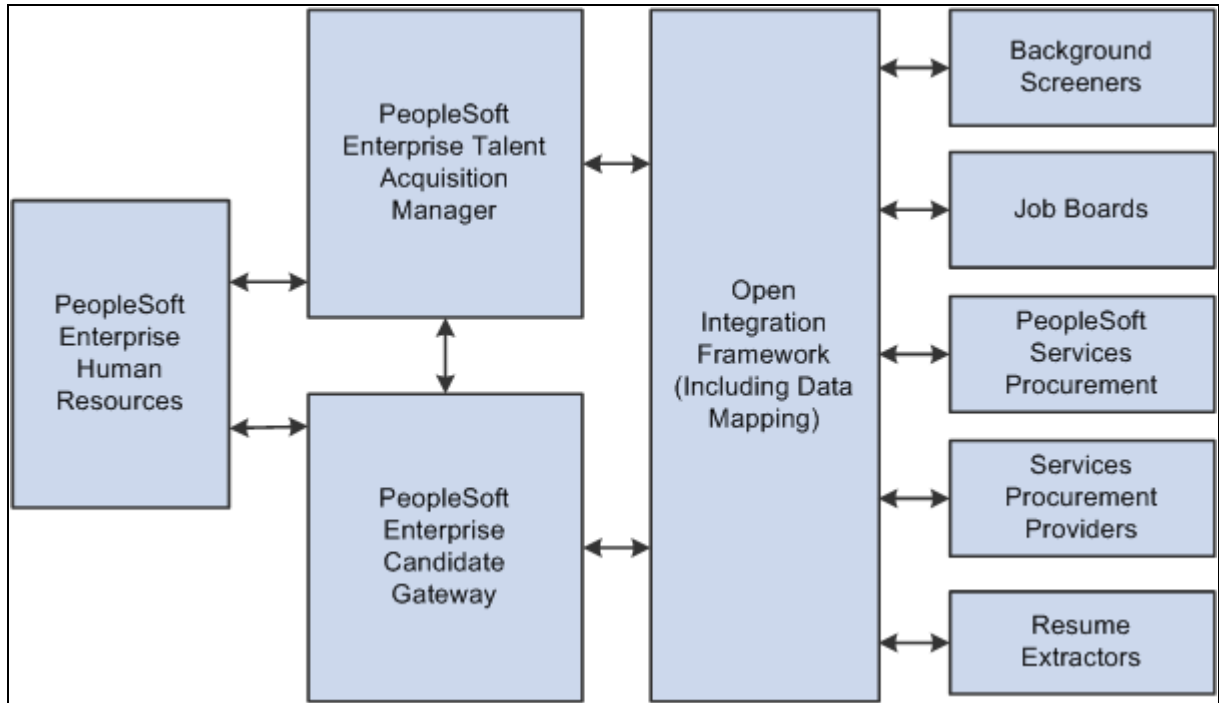
This pagelet provides recruiters with summary information for the recruiters own job openings. For example, there are alerts related to new applicants, interviews and interview evaluations, pending approvals, and expiring job offers.

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

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

Talent Acquisition Manager Integrations

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



Talent Acquisition Manager integrations with PeopleSoft Enterprise applications and external systems

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

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

Talent Acquisition Manager Implementation

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

PeopleSoft 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 table lists components that have component interfaces:

| Component | Component Interface | References |
|------------------|----------------------------|---|
| HRS_QSTN_SET_DEF | HRS_QSTN_SET_DEF_CI | See Chapter 5, "Setting Up Screening Processes," Setting Up Question Set Definitions , page 66. |
| HRS_QSTN_DEF | HRS_QSTN_DEF_CI | See Chapter 5, "Setting Up Screening Processes," Setting Up Question Definitions and Default Answer Scores , page 65. |
| HRS_LOCATION | HRS_LOCATION_CI | See Chapter 6, "Setting Up Additional Recruiting Definitions," Setting Up Recruiting Locations , page 93. |

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Understanding HRMS"

Enterprise PeopleTools PeopleBook: PeopleSoft Setup Manager

Enterprise PeopleTools PeopleBook: PeopleSoft Component Interfaces

Chapter 2

Defining Installation Options for Recruiting

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

- Activate recruiting applications.
- Set up Talent Acquisition Manager installation settings.

Understanding Talent Acquisition Manager Setup

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

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

Human Resources Foundation Tables

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

See Also

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

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

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

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

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up Jobs"

Additional PeopleSoft Human Resource Definitions

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

- PeopleSoft Enterprise Human Resources: Manage Profiles

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

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles*, "Setting Up the Content Catalog."

- PeopleSoft Enterprise Human Resources: Administer Workforce

Use Administer Workforce tables for contract administration.

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

- PeopleSoft Enterprise Human Resources: Administer Salary Packaging

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

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Salary Packaging*, "Understanding Administer Salary Packaging."

- PeopleSoft Enterprise Human Resources: Manage Positions

Use Manage Positions tables for position management.

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

- PeopleSoft Enterprise Human Resources: Manage Labor Administration

Use Manage Labor Administration tables for works council functionality.

PeopleSoft HCM Common Definitions

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

- Approvals

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

- Delegations

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

- Text Catalog

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

Recruiting-Specific Setup

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

- Set up profile integration.

See [Chapter 3, "Setting Up Profile Integration," page 25.](#)

- Set up recruiting statuses.

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

See [Chapter 4, "Setting Up Recruiting Statuses," page 35.](#)

- Set up screening processes.

See [Chapter 5, "Setting Up Screening Processes," page 57.](#)

- Set up additional recruiting definitions.

See [Chapter 6, "Setting Up Additional Recruiting Definitions," page 87.](#)

- Set up recruiting templates.

See [Chapter 7, "Setting Up Recruiting Templates," page 113.](#)

- Set up recruitment sources and third-party integrations.

See [Chapter 8, "Setting Up Recruitment Sources and Third Party Integrations," page 155.](#)

Activating Recruiting Applications

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

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

Page Used to Activate Recruiting Applications

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|------------------|------------------------|--|---|
| Products | INSTALLATION_TBL1 | Set Up HRMS, Install, Installation Table, Products | Select the PeopleSoft applications for your installation. |

Selecting PeopleSoft Applications for Your Installation

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

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

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

Setting Up Talent Acquisition Manager Installation Settings

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

This section discusses how to:

- Define general settings for templates, approvals, and integrations.
- Define job-related settings.
- Define applicant-related settings.
- Specify starting numbers for system-assigned numbers.

Pages Used to Set Up Talent Acquisition Manager Implementation Defaults

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

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

Defining General Settings for Templates, Approvals, and Integrations

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

| | | | |
|---|---|------------|-------------------|
| General | Jobs | Applicants | Last Assigned IDs |
| Template Settings | | | |
| *Template Segmenting Type: | Job Family | | |
| Default Templates | | | |
| Standard Requisition: | Requisition Default | | |
| Continuous Job Opening: | Continuous Default Apprv OFF | | |
| Interview Evaluation: | Default Interview | | |
| Approvals Required | | | |
| <input type="checkbox"/> Standard Requisition | <input type="checkbox"/> Job Offers | | |
| <input type="checkbox"/> Continuous Job Opening | <input type="checkbox"/> Optional Works Council | | |
| Integration Settings | | | |
| *Allow Profile Utilization: | Yes | | |
| *Person Profile Integration: | Yes | | |
| *Calendar Integration: | Partial | | |

Recruiting Installation - General page

Template Settings

Template Segmenting Type

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

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

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

Available segmenting types are:

- *Business Unit.*

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

- *Company.*
- *Department.*
- *Job Code.*

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

- *Job Family.*
- *Job Profile.*

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

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

- *Salary Grade.*

See [Chapter 10, "Creating Job Openings," Entering Primary Job Opening Information, page 215.](#)

Default Templates

Standard Requisition and Continuous Job Opening Select the default recruitment template for your standard requisitions and your continuous job openings. The system uses these template for new job openings when there is not another template that is associated with the specific segmenting value you've entered.

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

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

Interview Evaluation 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, or when the job opening's recruitment template does not include an interview evaluation template.

Approvals Required

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

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

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

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

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

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

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

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

Integration Settings

Allow Profile Utilization Select *Yes* to activate profile integration, or select *No* to disable this integration.

If profile integration is active, users who create job openings can select up to three profiles whose characteristics will be imported into the newly created job opening.

If your Template Segmenting Type is *Job Profile*, then job openings are already configured to import characteristics of a profile that you select when you create the job. If you segment by job profile *and* you allow profile utilization, then users must select one job profile because of the segmenting rule, and can optionally select up to two more person and non-person profiles (for a total of three) because of the profile utilization setting.

In this situation, segmenting by job profile serves for template selection, but it does not offer any additional profile capabilities, it only enforces the selection of at least one profile and limits the number of other profiles that can be selected during job opening creation.

Generally, organizations that allow profile utilization will not also segment by profile.

Person Profile Integration

When profile utilization is not allowed at all, this system sets the value to *No* and makes the field read-only.

However, if you allow profile utilization, use this field to determine which types of profiles can be selected when a user creates a job opening. Select *Yes* to enable users to select both person and non-person profiles, or select *No* to limit profile selection to non-person profiles.

Even if users can select person profiles, they can select only person profiles for people to whom they normally have security access (such as direct reports).

Calendar Integration

Select *Full* to activate integration with Microsoft Outlook 2007. This integration enables recruiters to schedule interviews using Microsoft Outlook meeting requests. This is a two-way integration; the system updates interview data in Talent Acquisition Manager using information from Microsoft Outlook 2007.

Select *Partial* to send interview schedules to participants as an iCalendar attachment. The participant can import the iCalendar meeting request and act on it. This is a one-way message, and TAM does not get any response back from the participant.

Select *None* if you do not want to use full or partial calendar integration.

Defining Job-Related Settings

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

| | |
|---|-------|
| General Jobs Applicants Last Assigned IDs | |
| Job Opening Settings | |
| *Allow multiple jobs/positions: | No |
| Randomize Screening Questions: | No |
| Randomize Screening Answers: | No |
| Job Posting Settings | |
| Max Job Posts per Notification: | 20 |
| Days Available for Latest Postings: | 365 |
| Job Opening Search Autosave and Result Control | |
| Enforce Search Save: | No |
| Search Result Limit: | 10000 |

Recruiting Installation - Jobs page

Job Opening Settings

Allow multiple jobs/positions

Select *Yes* if you want to allow multiple jobs or positions linked to one job opening, otherwise select *No*.

When you select *Yes*, the Job Code Information group box appears on the Job Opening page.

Randomize Screening Questions

Select *Yes* if you want applicant questionnaires to present questions in random order, disregarding the questions' order numbers. When an applicant applies for multiple jobs openings, questions from all job openings are randomized together.

Select *No* to order questions based on the order numbers specified in the qualifications section of the job opening details (for job-specific screening questions) or in the resume template (for questions when an application is not associated with any job openings).

Regardless of the value you select, open-ended questions always appear after multiple-choice questions.

Randomize Screening Answers

Select *Yes* if you want applicant questionnaires to present answers to multiple choice questions (including yes/no questions) in random order.

Select *No* to order answers based on their answer ID (which is the order in which they appear in the question definition.)

Job Posting Settings

| | |
|--|--|
| Max Job Posts Per Notification | <p>Enter the maximum number of job postings that can be listed in a Job Agent email notification. If the Job Agent search criteria finds more job postings than are allowed, the email lists as many as are allowed and then appends a message directing the recipient to visit the Careers page to view all search results.</p> <p>The maximum value you can enter is 99.</p> <p>See Chapter 19, "Managing Applicants," Using the Job Search Agent, page 631.</p> |
| Days Available for Latest Posting | <p>Enter the number of days that the system looks back when selecting job postings to include in the Latest Job Postings section of the Candidate Gateway Careers page. If the field is empty, Candidate Gateway looks back 30 days when selecting job postings to display.</p> <p>The value that is appropriate for your organization depends on how frequently you add job postings.</p> <hr/> <p>Note. Be sure to change the default value. The system comes with a very large default value designed to work with the PeopleSoft sample data. This lengthy look-back period is not appropriate for a live system.</p> <hr/> |

Job Opening Search Autosave and Result Control

| | |
|----------------------------------|---|
| (USA) Enforce Search Save | <p>Select <i>Yes</i> or <i>No</i> to indicate whether you want the system to force users to save the results of applicant searches when a specific job opening is part of the search criteria. The search results are saved for auditing and statutory reporting purposes.</p> <p>This functionality supports requirements of the Office of Federal Contract Compliance Programs (OFFCP)</p> |
| Search Result Limit | <p>Enter the maximum number of rows that can appear in the search results when a user searches for applicants using a Verity-based search.</p> <hr/> <p>Important! This setting applies only if you select <i>Yes</i> in the Enforce Search Save field.</p> <hr/> <p>When applicant searches are run directly against the database, PeopleTools limits the results to a maximum of 300. But results from Verity-based searches can be presented in grids with more than 300 rows. In general the maximum number of rows returned for an advanced search will be 500, but if the Enforce Search Save option is active, the maximum number of rows depends on the value you enter in the Search Results Limit field.</p> |

Defining Applicant-Related Settings

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

The screenshot shows the 'Applicants' tab in the Recruiting Installation interface. It is divided into two main sections: 'Applicant Settings' and 'Apply Online'.

Applicant Settings:

- Verify Employee ID: Optional (dropdown)
- Verify Person of Interest: No (dropdown)
- Inactive State for Duplicates: 030 (text input) with a magnifying glass icon and the text '030 Inactive' to its right.
- Allow Online Job Offers: Yes (dropdown) with a link to 'Regulatory Regions'.
- Days Online Offer Valid: 10 (text input)
- Administrator Evaluation Edit: Yes (dropdown)

Apply Online:

- Site ID: Default Site (dropdown)
- Days Job Search Agent Active: 30 (text input)
- Maximum Job Agents: 10 (text input)

Recruiting Installation - Applicants page

Applicant Settings

Verify Employee ID Select whether it is *Required* or *Optional* for a recruiter to search the HR database during the Prepare for Hire process to determine whether an applicant was a previous employee, contingent worker, or person of interest for the company. Such searches help prevent duplicate records for the applicant

Verify Person of Interest Select *Yes* if you want the system to search the HR database for an existing record when you add an external applicant to the system as a person of interest using the Add Person of Interest action. Such searches help prevent duplicate records for the applicant.

Select *No* to let external applicants be added as Persons of Interest without first searching for an existing record.

Inactive State for Duplicates Select the status that the system will assign to duplicate applicant records that are inactivated during the duplicate merge process. For example, if you merge three records, one record continues to be active, and the other two are assigned the status that you designate in this field.

Allow Online Job Offers Select *Yes* to enable online job offer functionality, including the ability to make offer letters and other attachments available in Candidate Gateway and the ability for applicants to accept or reject the offers in the same manner.

To disallow online job offer functionality, select *No*.

- Regulatory Regions** Click this link, which is only available if the Allow Online Job Offers field value is *Yes*, to access the Online Job Offers - Select Regulatory Regions page, where you specify which regulatory regions use online job offer functionality.
- Days Online Offer Valid** If the Allow Online Job Offers field value is *Yes*, enter the number of days that an online job offer remains valid. If the applicant has not accepted the job offer within the specified number of days, the offer expires.
- Administrator Evaluation Edit** Select *Yes* or *No* to indicate whether administrators are allowed to edit, delete, and send back interview evaluations.
This setting applies only to interview evaluations, not to open-ended question evaluations.

Apply Online

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

- Site ID** Select a default site ID for the system to use when it cannot determine a specific site. Choose from the sites that have been defined on the Site - Setup Site page.
See [Chapter 6, "Setting Up Additional Recruiting Definitions," Setting Up Sites, page 90.](#)
- Days Job Search Agent Active** Enter the number of days that an applicant's job search agent is kept in the database.
The maximum number of days that an applicant's job search agent can stay active is 999. This setting is used by the Job Agent process to determine whether applicants' saved job agents are out of date and should be deleted. If you do not enter a value, the system keeps job agents in the database indefinitely.
- Maximum Job Agents** Enter the maximum number of job agents that an applicant can have.
The default is five.

See Also

- [Chapter 15, "Making Job Offers," Creating Job Offers, page 469](#)
- [Chapter 19, "Managing Applicants," Processing Duplicate Applicants, page 620](#)
- [Chapter 16, "Hiring Applicants," Employee ID Verification, page 505](#)
- [Chapter 19, "Managing Applicants," Using the Job Search Agent, page 631](#)
- [Chapter 14, "Interviewing Applicants," Completing Interview Evaluations, page 448](#)

Selecting Regulatory Regions for Online Job Offers

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

Online Job Offers - Select Regulatory Regions

Regulatory Regions [Customize](#) | [First](#) [1-38 of 38](#) [Last](#)

| Include | Regulatory Region |
|-------------------------------------|---------------------------|
| <input type="checkbox"/> | Scotland - United Kingdom |
| <input type="checkbox"/> | Wales - United Kingdom |
| <input type="checkbox"/> | Hong Kong |
| <input type="checkbox"/> | HXUSA Regulatory Region |
| <input type="checkbox"/> | India |
| <input type="checkbox"/> | Italy |
| <input type="checkbox"/> | Japan |
| <input type="checkbox"/> | Mexico |
| <input type="checkbox"/> | Malaysia |
| <input type="checkbox"/> | Netherlands |
| <input type="checkbox"/> | New Zealand |
| <input type="checkbox"/> | Republic of Ireland |
| <input type="checkbox"/> | Singapore |
| <input type="checkbox"/> | Thailand |
| <input checked="" type="checkbox"/> | United States |

[Select All](#) [Deselect All](#)

Online Job Offers - Select Regulatory Regions page

Include

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

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

Specifying Starting Numbers for System-Assigned Numbers

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

| General | Jobs | Applicants | Last Assigned IDs |
|-----------------------------|-------------------------------------|--------------------------|-----------------------------------|
| Job Opening Counters | | | |
| Job Opening ID: | <input type="text" value="503713"/> | Recruiting Location: | <input type="text" value="1253"/> |
| JO Screening Summary ID: | <input type="text" value="1186"/> | Screening Template ID: | <input type="text" value="2003"/> |
| Screening ID: | <input type="text" value="1013"/> | Recruitment Template ID: | <input type="text" value="2007"/> |
| Job Opening Posting ID: | <input type="text" value="1002"/> | Job Opening Template ID: | <input type="text" value="1008"/> |
| Team ID: | <input type="text" value="1004"/> | | |
| Applicant Counters | | | |
| Applicant ID: | <input type="text" value="500185"/> | Last Resume ID Used: | <input type="text" value="1336"/> |
| Last Page Layout ID: | <input type="text" value="88"/> | Correspondence ID: | <input type="text" value="1004"/> |
| Last Resume Number: | <input type="text" value="1000"/> | Resume Template ID: | <input type="text" value="2007"/> |
| Duplicate Process ID: | <input type="text" value="1"/> | | |

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

| Recruitment Counters | | | |
|----------------------------|-----------------------------------|---------------------------|-----------------------------------|
| Answer ID: | <input type="text" value="1099"/> | Offer ID: | <input type="text" value="1117"/> |
| Works Council Decision ID: | <input type="text" value="1002"/> | Offer Letter ID: | <input type="text" value="1000"/> |
| Checklist ID: | <input type="text" value="1024"/> | Question ID: | <input type="text" value="1105"/> |
| Evaluation ID: | <input type="text" value="1012"/> | Question Set ID: | <input type="text" value="1023"/> |
| Interview Category ID: | <input type="text" value="1001"/> | Recruitment ID: | <input type="text" value="2237"/> |
| Interview Rating: | <input type="text" value="1000"/> | Recruitment Letter ID: | <input type="text" value="1019"/> |
| Interview ID: | <input type="text" value="1115"/> | Recruitment Interview ID: | <input type="text" value="1030"/> |
| Interview Letter ID: | <input type="text" value="1000"/> | Route ID: | <input type="text" value="1072"/> |
| Venue ID: | <input type="text" value="2"/> | | |

| Correspondence Counters | | | |
|-------------------------|-----------------------------------|-----------------|-----------------------------------|
| List ID: | <input type="text" value="1010"/> | Package ID: | <input type="text" value="1000"/> |
| Notes ID: | <input type="text" value="1030"/> | Contact Method: | <input type="text" value="1000"/> |
| Correspondence ID: | <input type="text" value="1004"/> | Token ID: | <input type="text" value="1017"/> |
| Parameter ID: | <input type="text" value="1000"/> | | |

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

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

[Fix Counters](#)

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

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

Fix Counters

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

Chapter 3

Setting Up Profile Integration

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

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

See Also

[Chapter 10, "Creating Job Openings," Understanding Profile Integration for Job Openings, page 208](#)

[Chapter 11, "Entering Applicant Data," Understanding Profile Information in Job Applications, page 303](#)

Understanding Profile Architecture

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

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

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

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

Profile Type

Profile types define the structure of your profiles. A profile type includes content types, but not content items. That is, a particular profile type might include content types such as competencies and memberships, but it does not reference particular competencies or particular memberships.

The profile type also defines whether the profile is linked to person IDs to create person profiles, or linked to business entities, such as job code or positions, to create non-person profiles.

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

Choosing the Primary Person Profile Type for Recruiting

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

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

Understanding the Primary Person Profile Types

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

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

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

See [Chapter 11, "Entering Applicant Data," page 299](#).

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

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

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

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

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

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

See Also

[Chapter 3, "Setting Up Profile Integration," Configuring Profiles for Recruiting, page 28](#)

[Chapter 7, "Setting Up Recruiting Templates," Setting Up Job Opening Templates, page 130](#)

[Chapter 7, "Setting Up Recruiting Templates," Setting Up Resume Templates, page 115](#)

Page Used to Set Up the Primary Person Profile for Recruiting

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

Setting Up the Primary Profile Types for Recruiting

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

Assign Profile Type Defaults

*Primary Person Profile Type:  Person

*Primary NonPerson Profile Type:  Job

Assign Profile Type Defaults page

- Primary Person Profile Type** Enter the primary person profile type. This is a system-wide setting that is used throughout PeopleSoft Enterprise Human Resources. In Talent Acquisition Manager, the primary person profile type determines the content types that are available for use in job openings and in applications.

The delivered primary person profile type is *PERSON*.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles*, "Setting Up Profile Management," Assigning Profile Type Defaults.
- Primary NonPerson Profile Type** Talent Acquisition Manager does not use the system's primary nonperson profile type.

Configuring Profiles for Recruiting

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

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

Understanding Content Type Configuration for Recruiting

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

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

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

Page Used to Configure Profiles for Recruiting Use

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


Configuring Profiles for Recruiting Use


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

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

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

Licenses & Certifications

Status Date:  Applicant may add items

| Properties Customize Find  First 1-10 of 10 Last | | | | | | |
|--|------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|---------|
| Field Name | Label Text | Required | Summary | Detail | Use in Screening | Default |
| JPM_CAT_ITEM_ID | License | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| JPM_CAT_TYPE | Content Type | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| COUNTRY | Country | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| STATE | State | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| JPM_YN_1 | Renewal Required | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | |
| JPM_YN_2 | Renewal In Progress | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | |
| JPM_YN_3 | License Verified | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | |
| JPM_DATE_3 | Expiration Date | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| JPM_TEXT254_2 | License/Certification Number | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| JPM_TEXT254_4 | Issued By | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |

Content Section Configuration – <Content Type> page

Applicant may add items

Select this check box to indicate that Candidate Gateway will allow applicants to add content items to their applications. Deselect this check box if applicants can modify the details for existing content items, but not add new ones. For example, you may want applicants to provide proficiency ratings for specific competencies, but you do not want applicants to add additional competencies that you do not consider relevant to the recruiting process.

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

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

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

Properties

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

Field Name and Label Text

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

Required

If this check box is selected, the property is required. Otherwise, it is optional. For example, in the Degrees content type, the degree itself is a required property, while additional properties such as the school code are optional.

This check box is read-only; this setting comes from the content type definition in the Manage Profiles module.

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

Setting Up Profile Integration for Job Openings

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

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

Understanding Set Up for Profile Integration for Job Openings

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

Integration Activation

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

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

Person Profile Security for Job Openings

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

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

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

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

Pages Used to Set Up Profile Integration for Job Openings

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

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

This section provides overviews of:

- Recruiting status areas.
- Recruiting status setup
- Delivered status codes and reasons
- Delivered status change effects

Recruiting Status Areas

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

The Six Status Areas

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

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

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

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

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

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

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

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

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

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

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

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

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

The Route and Interview Status Areas

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

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

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

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

See [Chapter 13, "Screening and Routing Applicants," Routing Applicants, page 417.](#)

Recruiting Status Setup

The two steps to setting up recruiting statuses are:

1. Define status codes and associated reasons for each of the six recruitment areas.
2. Define the rules that govern how the statuses are processed, including:
 - a. The status progression within each recruitment area.
 - b. The effects of applying each status.

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

Status Progression

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

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

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

Effect of Status Changes

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

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

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

| 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 <i>Reject</i> and reason code to <i>Another Applicant was Hired</i> . |
| Job Opening | Job Opening | If all the openings are filled, set the Job Opening Status to <i>Filled/Closed</i> . |

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

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

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

For each rule, you define:

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

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

Effects of Status Change

Recruitment Area: 3-Summary

Description: 090 Hired

Status Changes Find | View All | First 1 of 4 Last

*Recruitment Area: Job Opening + -

New Status: 110 Filled/Closed

New Reason:

Revert to Last Status / Reason

Apply To Customize | Find | View All | First 1-2 of 2 Last

| Status | All Reasons | Specific Reason | | |
|----------|-------------------------------------|----------------------|---|---|
| 010 Open | <input checked="" type="checkbox"/> | <input type="text"/> | + | - |
| 100 Hold | <input checked="" type="checkbox"/> | <input type="text"/> | + | - |

Example of the Effects of Status Change page

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

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

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

Delivered Status Codes and Reasons

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

| Recruitment Area | Status Code | Table |
|------------------|---|-----------------|
| Job Opening | <i>Draft</i> <i>Pending Approval</i> <i>Denied</i> <i>Open</i> <i>Hold</i> <i>Filled/Closed</i> <i>Canceled</i> | HRS_JOB_OPENING |

| Recruitment Area | Status Code | Table |
|-------------------------|--|---------------|
| Applicant | <i>Active</i> <i>Hired</i> <i>Inactive</i> <i>Queued</i> | HRS_APPLICANT |
| Recruitment Summary | <i>Draft</i> <i>Review</i> <i>Linked</i> <i>Linked Questionnaire</i> <i>Applied</i> <i>Screen</i> <i>Route</i> <i>Interview</i> <i>Preliminary Offer Decided</i> <i>Offer</i> <i>Offer Accepted</i> <i>Preliminary Offer Notified</i> <i>Preliminary Offer Accepted</i> <i>Preliminary Offer Rejected</i> <i>Hire Decided</i> <i>Ready to Hire</i> <i>Hired</i> <i>Hold</i> <i>Reject</i> <i>Failed Prescreening</i> <i>Reject Online Screening</i> <i>Withdrawn</i> <i>Inactive</i> | HRS_RCMNT |
| Route | <i>Routed</i> <i>Invite for Interview</i> <i>Hold</i> <i>Reject</i> <i>Withdrawn</i> | HRS_APP_RTE |

| Recruitment Area | Status Code | Table |
|-------------------------|---|--------------|
| Interview | <i>Interview</i> <i>Make Offer</i> <i>Hold</i> <i>Reject</i> <i>Withdrawn</i> | HRS_RCM_INT |
| Offer | <i>Draft</i> <i>Pending Approval</i> <i>Denied</i> <i>Extend</i> <i>Accept</i> <i>Acceptance Withdrawn</i> <i>Hold</i> <i>Offer Rejected</i> <i>Offer Withdrawn</i> | HRS_OFFER |

Delivered Status Change Effects

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

Job Opening Status Change Effects

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

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

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

Applicant Status Change Effects

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

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

Recruitment Summary Status Change Effects

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

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

| <i>If the Recruitment Summary status is changed to:</i> | <i>Then look in this recruitment area:</i> | <i>For statuses equal to:</i> | <i>And change the status - reason to:</i> |
|--|---|--------------------------------------|--|
| <i>Withdrawn</i> | Interview | <i>Interview</i> <i>Hold</i> | <i>Withdrawn</i> |
| <i>Withdrawn</i> | Offer | <i>Extend</i> <i>Hold</i> | <i>Offer Withdrawn</i> |

Route Status Change Effects

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

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

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

Interview Status Change Effects

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

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

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

Offer Status Change Effects

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

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

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

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

Setting Up Recruiting Statuses

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

This section discusses how to:

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

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

Pages Used to Set Up Recruiting Statuses

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

Defining Statuses and Reasons Codes

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

Statuses and Reasons

Recruitment Area: 3-Recruitment Summary

Status Find | View All First 6 of 23 Last

*Status Cd: + -

*Description:

Short Description:

Recruitment Phase:

Status Attributes

Draft Open

Approval Status Attributes

Approval Status Approval Default Approval Denied

Only one row for this applicant can have this status

| Associated Reasons | | | | |
|----------------------------------|---|-------------------------------------|---|---|
| *Reason Cd | *Description | Short Description | | |
| <input type="text" value="010"/> | <input type="text" value="Preliminary Screen"/> | <input type="text" value="Prelim"/> | + | - |
| <input type="text" value="020"/> | <input type="text" value="Final Screen"/> | <input type="text" value="Final"/> | + | - |

Statuses and Reasons

Recruitment Area Displays the recruitment area whose statuses you are defining.

Status Cd (status code) and **Description** Enter a unique identifier and a description for each status code.

Recruitment Phase When defining statuses for the Recruitment Summary area, select a value to identify the overall phase of the recruitment process to which the status belongs. Select from these values: *1-Review, 2-Applied, 3-Screen, 4-Route, 5-Interview, 6-Offer, 7-Hire, or 8-Reject.*

Certain recruiting processes use this information to identify applicants who are at specific points in the recruiting process. For example, when you access the Prepare Job Offer page from the Recruiter Alert pagelet, the system displays a list of applicants whose status is associated with the *Offer* phase.

Status Attributes

Draft

Select to indicate that records with this status are considered work-in-progress and are not yet active or available for further processing until approved.

For the job opening status area, this setting controls which status is applied when a user clicks the Save as Draft button on a job opening that has not yet been submitted. Additionally, if job opening approvals are active, the designated draft status is used for new job openings that are created by cloning an existing job opening.

For the offer status area, this setting controls which status is applied when a user clicks the Save for Later button on a job offer that has not yet been submitted.

For the recruitment summary status area (dispositions), this setting controls which status is applied when an applicant is using Candidate Gateway to apply online and the applicant saves the in-progress application without submitting it.

Note. Although the system does not prevent you from choosing more than one draft status in a status area, status areas where there is system logic that automatically applies the draft status should have only a single status marked as the draft status.

Open

Select to indicate that records with this status are active and available for further processing.

Only one row for this applicant can have this status

Select this check box to identify a status that can be used for only one row of data for an applicant. For example, in the Recruitment Summary area, this check box is selected for the delivered *Hired* status. If an applicant who has already been hired for one job opening is subsequently hired for another job opening, the system display a warning to let the user know that the status should be used for only one record for the applicant. The user can still continue with the action if, for example, the applicant is being hired for multiple job openings or if the applicant was previously hired for a job and subsequently left the job.

This field is not visible for the Job Opening recruitment area.

Approval Status Attributes

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

Approval Status

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

Approval Default

Select this check box for the status that the system should apply when a record is submitted for approval.

This check box is available only if the Approval Status check box is selected.

Approval Denied Select this check box for the status that the system should apply when approval is denied.

This check box is available only if the Approval Status check box is selected.

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

Associated Reasons

Optionally create reasons that are associated with the status.

Reason Cd (reason code) Enter a unique identifier and a description for each reason.
and **Description**

Setting Up Rules for Status Areas

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

| Status Area | | | | | |
|-------------------------------|-------------------------------------|-------------------------------------|--------------------------|----------------------------|--|
| Recruitment Area: | | 1-Job Opening | | | |
| Define Recruitment Area Rules | | | | | |
| Description | Default | Complete | Notification | | |
| 005 Draft | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Successors | Effects of Status Change |
| 006 Pending Approval | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Successors | Effects of Status Change |
| 008 Denied | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Successors | Effects of Status Change |
| 010 Open | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Successors | Effects of Status Change |
| 100 Hold | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Successors | Effects of Status Change |
| 110 Filled/Closed | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Successors | Effects of Status Change |
| 120 Canceled | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Successors | Effects of Status Change |

Status Area page

- Default** Select this check box to indicate the status that the system should apply to new records and, in areas where approvals are active, to newly approved records.
- For example, when job opening approvals are not active, the default status for the job opening status area is applied when a user clicks the Save and Open button on a new job opening. Additionally, the default status is used for new job openings that are created by cloning an existing job opening.
- You can select one status only as the default.
- Complete** Select this check box if the status indicates the successful completion of the recruitment process. *Successful* refers to the most desirable outcome of the process—one that results in a hired applicant. For example, in the Job Opening status area, both *Filled/Closed* and *Canceled* are possible final statuses, but only *Filled/Closed* represents the *successful* completion of the recruitment process.
- You can select one status only as the complete status.
- For the Job Opening, Applicant, and Recruitment Summary status areas, the system displays an error if a user attempts to change a status from the complete status. In the Route, Interview, and Offer status errors, the system displays a warning, but lets the user continue.
- Notification** Select this check box if you want a notification sent to the primary recruiter and the primary hiring manager when the status is applied.
- For Job Openings, the *JobOpeningStseffect* template is used.
- For Applicants, the *ApplicantStsEffect* template is used.
- For all other areas, the *OtherStsEffect* 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 (click the Successors link on the Status Area page).

Status Successors

Recruitment Area: 3-Summary
 Description: 020 Applied

| Status Successor Details | | | |
|---|-------------------------------------|---|---|
| Customize Find View All [?] [grid icon] First 1-10 of 10 Last | | | |
| *Status Successor | Default | | |
| 010 Review | <input checked="" type="checkbox"/> | + | - |
| 030 Screen | <input type="checkbox"/> | + | - |
| 050 Route | <input type="checkbox"/> | + | - |
| 060 Interview | <input type="checkbox"/> | + | - |
| 070 Offer | <input type="checkbox"/> | + | - |
| 080 Ready to Hire | <input type="checkbox"/> | + | - |
| 090 Hired | <input type="checkbox"/> | + | - |
| 100 Hold | <input type="checkbox"/> | + | - |
| 110 Reject | <input type="checkbox"/> | + | - |
| 120 Withdrawn | <input type="checkbox"/> | + | - |

OK Cancel

Status Successors page

Recruitment Area and Description Identifies the status whose successors you are listing.

Status Successor Details

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

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

Defining the Effects of Status Changes

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

Effects of Status Change

Recruitment Area: 3-Summary

Description: 090 Hired

Status Changes Find | View All | First ◀ 3 of 4 ▶ Last

***Recruitment Area:** Recruitment Summary + -

Affected Applicant: Current Appl / Other Job Reqs

New Status: 110 Reject

New Reason: Selected for Other Position

Revert to Last Status / Reason

Apply To Customize | Find | View All | [Print] [Grid] First ◀ 1-5 of 9 ▶ Last

| Status | All Reasons | Specific Reason | | |
|-------------|-------------|-----------------|---|---|
| 010 Review | ☑ | | + | - |
| 015 Linked | ☑ | | + | - |
| 020 Applied | ☑ | | + | - |
| 030 Screen | ☑ | | + | - |
| 050 Route | ☑ | | + | - |

Effects of Status Change page

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

Status Changes

Recruitment Area (in the Status Changes group box) Identify the recruitment area that is affected by the status that is shown at the top of the page.

If the status that appears at the top of the page is in the Recruitment Summary area, you can select other recruitment areas that are affected by the status change. Otherwise, the only status area that can be changed is *Recruitment Summary*, and the field is read-only.

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

Chapter 5

Setting Up Screening Processes

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

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

Understanding Screening Setup

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

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

This overview discusses:

- Screening criteria.
- Processing rules.

Screening Criteria

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

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

- General requirements.

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

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

- Education and experience.

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

- Screening questions.

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

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

- Profile content types.

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

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

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

See Chapter 7, "Setting Up Recruiting Templates," page 113.

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

| Criteria Type | Setup Requirements |
|----------------------|--|
| General Requirements | <ul style="list-style-type: none"> • Include the <i>Job Information</i> section and, optionally, the <i>Salary Information</i> section in the job opening template. The <i>Job Information</i> section is a mandatory part of every job opening template. • Include the <i>Preferences</i> section in the resume template. This configures the online application pages so that applicants can enter general preferences such as location, work days, regular/temporary, and so forth. |

| Criteria Type | Setup Requirements |
|--------------------------|---|
| Education and Experience | <ul style="list-style-type: none"> • Include the <i>Education and Experience</i> section in the job opening template. This configures the Job Opening page to includes a grid where recruiters can enter education and experience requirements. • Include the <i>Education History</i> and <i>Work History</i> sections in the resume template. This configures the online application pages so that applicants can enter their highest education level and can provide work history details, including start and end dates for each period of employment. |
| Screening Questions | <ul style="list-style-type: none"> • Include the <i>Screening Questions</i> section in the job opening template. This configures the Job Opening page to includes a grid where recruiters can add questions to the job opening. • Include the <i>Online Questionnaire</i> section in the resume template. This configures the online application pages so that applicants can see and answer the questions while completing a job application. • Define reusable question definitions that recruiters can associate with job openings. See Chapter 5, "Setting Up Screening Processes," Setting Up Screening Questions, page 61. |
| Profile content types | <ul style="list-style-type: none"> • Include the corresponding section in the job opening template. This configures the Job Opening page to includes a grid where recruiters can add content items to the job opening. • Include the corresponding section in the resume template. This configures the online application pages so that applicants can add content items to their applications. • Use the Content Section Configuration page to mark the content type for use in screening, and to choose which of its attributes are used to evaluate the applicant. See Chapter 5, "Setting Up Screening Processes," Making Content Types Available for Screening, page 69. <p>Note. If you use content types other than those that Oracle delivers, you must first set up those content types and, to make them available to the recruiting system, you must add them to the primary person profile that you identified on the Assign Profile Type Defaults page.</p> <p>See Chapter 3, "Setting Up Profile Integration," Choosing the Primary Person Profile Type for Recruiting, page 26.</p> |

Processing Rules

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

Rules That Apply to a Single Screening Level

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

See [Chapter 5, "Setting Up Screening Processes," Setting Up Screening Level Definitions, page 72.](#)

Examples of screening level processing rules include:

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

See [Chapter 5, "Setting Up Screening Processes," Understanding Prescreening and Online Screening, page 75.](#)

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

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

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

Rules That Reach Across Multiple Screening Levels

Certain processing rules reach across multiple screening levels.

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

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

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

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

See [Chapter 7, "Setting Up Recruiting Templates," Setting Up Screening Templates, page 140](#) and [Chapter 10, "Creating Job Openings," \(USF\) Understanding U.S. Federal Screening Setup, page 261.](#)

(USF) Federal Preference Items

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

- Priority placement status.
- Veterans preference.

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

See [Chapter 5, "Setting Up Screening Processes," \(USF\) Setting Up Preference Programs, page 81.](#)

Setting Up Screening Questions

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

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

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

Understanding Screening Question Setup

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

Screening Question Architecture

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

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

To set up screening questions:

1. Create an answer definition for each answer.

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

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

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

Adding Question Sections to Templates

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

1. Add the *Online Questionnaire* section to resume templates.

See [Chapter 7, "Setting Up Recruiting Templates," Setting Up Resume Templates, page 115.](#)

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

See [Chapter 7, "Setting Up Recruiting Templates," Setting Up Job Opening Templates, page 130.](#)

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

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

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

See [Chapter 5, "Setting Up Screening Processes," Understanding Prescreening and Online Screening, page 75.](#)

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

Adding Questions to Job Openings

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

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

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

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

Using Questions for Screening

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

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

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

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

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

See [Chapter 19, "Managing Applicants," Linking Applicants to Job Openings, page 585](#).

Changes to Questions

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

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

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

See Also

[Chapter 7, "Setting Up Recruiting Templates," Setting Up Job Opening Templates, page 130](#)

[Chapter 10, "Creating Job Openings," Entering Primary Job Opening Information, page 215](#)

Pages Used to Set Up Questionnaires

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

Setting Up Answer Definitions

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



Answer Definition

Answer ID: 1012

***Answer Code:**

***Description:**

Short Description:

***Long Description:**  

Answer Definition page

Answer Code

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

Description Enter an identifying name for this answer. A descriptive name helps you when you reference the answer definition from within a question definition. Other pages that display answers, however, use the full text of the answer rather than these shorter identifiers.

Long Description Enter the complete text of this answer.

Setting Up Question Definitions and Default Answer Scores

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

Question Definition

Question ID: 1004

***Question Code:** **Open Ended Question**

***Status:** **Status Date:** 08/09/2001

***Description:**

Short Desc:

Long Description:

| Answers | | | | |
|------------|------------------|-------------------------------------|----------------------|-----|
| *Answer ID | Long Description | Correct Answer | Default Points | |
| 1027 | No | <input type="checkbox"/> | <input type="text"/> | + - |
| 1037 | Yes | <input checked="" type="checkbox"/> | <input type="text"/> | + - |

Question Definition page

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

Open Ended Question Select this check box to identify an open-ended question. Because open-ended questions do not have predefined answer sets, selecting this check box removes the Answers grid from the page and replaces it with the Maximum Points field. When this check box is not selected, the question must have at least two possible answers.

Status and Status Date Indicate whether the definition is *Active* or *Inactive*. Whenever you change the status, the system changes the status date to the current date.

| | |
|--|---|
| Description and Short Description | Enter an identifying name for this question. A descriptive name helps recruiters identify the question when they manage the list of questions in a job opening or question set. |
| Long Description | Enter the complete text of this question. |
| Maximum Points | If this is an open-ended question, enter the maximum number of points (up to 100) that an applicant can receive for answering this question. The actual number of points that the applicant receives is determined by averaging scores that evaluators manually assign. Evaluators who have not yet evaluated the answer are not included in the calculation. |

Answers

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

| | |
|-------------------------|---|
| Answer ID | Select an answer to link to the question. |
| Long Description | After you enter an answer ID, the text of the answer (the long description on the Answer Definition page) appears in this column. |
| Correct Answer | <p>Select the check box next to any answer that is correct answer for the question. There can be more than one correct answer. The number of correct answers determines the number of check boxes that an applicant can select in the online questionnaire. For example, if a question has five answers, and two are marked as correct, then the applicant will be able to select a maximum of two answers at runtime.</p> <p>There must be at least one correct answer.</p> |
| Default Points | <p>Enter the default number of points that an applicant who selects this answer receives during screening. You can assign points to both correct and incorrect answers, depending on your business processes. When applicants can choose more than one answer, the screening process adds the points for all chosen answers to calculate the total points that the applicant is awarded for the question.</p> <p>It is possible to assign negative points to an answer to punish incorrect answers.</p> <p>Recruiters can override the default point value of an answer when configuring criteria for a specific screening level in a specific job opening.</p> |

Setting Up Question Set Definitions

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

Question Set Definition

Question Set

Question Set ID: 1013

*Question Set Code:

*Status: Status Date: 07/31/2001

*Description: Competency:

Short Description:

Explanation:

Questions Customize | Find | First 1-2 of 2 Last

| *Question ID | Long Description | Order Number | Action |
|-----------------------------------|--|---------------------------------|--|
| <input type="text" value="1006"/> | An Angry and argumentative customer calls with a question on how to implement software they had purchased from your company, you normally don't handle this type of call nor do you know the answer, What do you do? | <input type="text" value="5"/> | View Answers <input type="button" value="+"/> <input type="button" value="-"/> |
| <input type="text" value="1003"/> | How do you deal with an irate customer on the telephone | <input type="text" value="10"/> | Open Ended <input type="button" value="+"/> <input type="button" value="-"/> |

Question Set Definition page

- Question Set Code** Enter a code that identifies this question set. This code appears only on search pages and lookup dialog boxes. The system does not require this to be a unique code.
- Status and Status Date** Indicate whether the definition is *Active* or *Inactive*. Whenever you change the status, the system changes the status date to the current date.
- Description** Enter an identifying name for this question set. A descriptive name helps recruiters identify the question set when prompting for a question set to add to a job opening.
- Competency** Optionally identify the competency that is assessed through the applicant's answers to the questions in the question set. This is informational only; the competency does not affect the job opening, nor is it added to the job opening when you load the question set.
- Explanation** Enter details about the purpose or contents of the question set. This is helpful to anyone who needs to update the question set. It is not visible to users who add the question set to a job opening.

Questions

| | |
|-------------------------|---|
| Question ID | Enter the ID of each question that you want to add to the question set. |
| Long Description | After you enter a question ID, the text of the question (the long description on the Question Definition page) appears in this column. |
| Order Number | <p>Enter numbers to control the default order of for the questions in the set. When you load the question set into a job opening, these become the default order numbers in the Screening Questions grid. Users can then modify the order numbers for the individual job opening.</p> <p>The system does not prevent you from assigning the same order number to multiple questions. When you load question set definitions into a job opening, review the default order numbers and update them as necessary to create an unambiguous question order.</p> <p>Because this field accepts only integers, consider using non-consecutive numbers to make it easier to insert additional questions between existing questions.</p> <p>Regardless of the order numbers you assign, open-ended questions always appear at the end of the questionnaire, after all multiple-choice questions.</p> <hr/> <p>Note. If the Randomize Screening Questions field on the Recruiting Installation - Jobs page has a <i>Yes</i> value, then the system disregards the question order and presents questions to applicants in random order, although open-ended questions still appear after all multiple-choice questions.</p> <hr/> |
| Action | <p>Displays a link to the Question Answers page.</p> <p>For open-ended questions, the link text is <i>Open Ended</i>. When you click this link, the Question Answers page displays the text and the maximum point value of the open-ended question.</p> <p>For other questions, the link text is <i>View Answers</i>. When you click this link, the Question Answers page displays the question, its correct and incorrect answers, and the default point value of each answer.</p> |

Reviewing Answers to Questions in a Question Set

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

Question Set Definition

Question Answers

Question ID: 1038

Description: Driver's license?

Long Description: Do you possess a valid Driver's license?

| Answers | | | |
|-----------|-------------|-------------------------------------|----------------|
| Answer ID | Description | Correct Answer | Default Points |
| 1009 | Yes | <input checked="" type="checkbox"/> | 10 |
| 1025 | No | <input type="checkbox"/> | 0 |

OK Cancel

Questions Answers page: multiple-choice question

Question Set Definition

Question Answers

Question ID: 1066

Description: disclose pre-background check

Long Description: GBIBU makes use of a background check in respect of all applicants who are selected for interview. Is there any information you would wish to disclose to GBIBU at this stage bearing in mind that non-

Maximum Points: 10

OK Cancel

Question Answers page: open-ended question

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

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

Making Content Types Available for Screening

This section discusses how to configure content types for screening.

See Also

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

Page Used to Configure Content Types for Screening

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

Configuring Content Types for Screening

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

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

Competencies

Status Date: Applicant may add items

| Properties | | | | | |
|--------------------|----------------------|-------------------------------------|-------------------------------------|-------------------------------------|---------|
| Field Name | Label Text | Required | Summary | Use in Screening | Default |
| EVALUATION_ID | | <input type="checkbox"/> | <input type="checkbox"/> | | |
| JPM_CAT_ITEM_ID | Competency | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | |
| JPM_PERSON_ID_1 | EmpIID | <input type="checkbox"/> | <input type="checkbox"/> | | |
| JPM_CAT_TYPE | Content Type | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| EP_APPRAISAL_ID | Appraisal ID | <input type="checkbox"/> | <input type="checkbox"/> | | |
| RATING_MODEL | Rating Model | <input checked="" type="checkbox"/> | <input type="checkbox"/> | | PSCM |
| JPM_RATING1 | Proficiency | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| JPM_INTEREST_LEVEL | Interest Level | <input type="checkbox"/> | <input type="checkbox"/> | | |
| JPM_VERIFY_METHOD | Verified By | <input type="checkbox"/> | <input type="checkbox"/> | | |
| JPM_CAT_ITEM_QUAL | Evaluation Type | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| JPM_CAT_ITEM_QUAL2 | Reviewer ID | <input type="checkbox"/> | <input type="checkbox"/> | | |
| JPM_INTEGER_1 | Year Last Used | <input type="checkbox"/> | <input type="checkbox"/> | | |
| JPM_INTEGER_2 | Year Acquired | <input type="checkbox"/> | <input type="checkbox"/> | | |
| JPM_DECIMAL_2 | Years Of Experience | <input type="checkbox"/> | <input type="checkbox"/> | | |
| JPM_YN_1 | Reviewer Is Approved | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |

Content Section Configuration page

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

See [Chapter 3, "Setting Up Profile Integration," Choosing the Primary Person Profile Type for Recruiting, page 26.](#)

Properties

This grid lists all properties of the selected content type.

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

Use in Screening

Select this check box to make the field available for screening. Fields where this check box is selected are included in the criteria list on the Job Opening Screening Criteria page, where you choose which of the available criteria to use in a specific screening level.

For example, the delivered configuration for the Competencies content type has only one field that is available for screening: the Proficiency field. When you add a competency to a job opening, you will enter data such as the competency name, rating type, and the rating. But when you configure the screening criteria for the job opening, the rating is the only competency-related information that is listed in the grid where you select screening criteria. (Because the rating is associated with a particular competency and rating model, the screening process automatically looks for the rating for that particular competency).

If you were to change the configuration for competencies so that the competency name was the only field used in screening, then the screening process would simply check that the applicant's application lists the competency, regardless of the applicant's rating.

Note. If the JPM_CAT_ITEM_ID attribute is selected and one or more additional fields are also selected, then only additional fields are used for screening. For example, when configuring competencies, if you select both the JPM_CAT_ITEM_ID (Competency) field and the JPM_RATING1 (Proficiency) field, only the Proficiency field is available for screening.

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

Setting Up Screening Level Definitions

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

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

Understanding Screening Levels

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

Screening Level Usage

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

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

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

Screening Level Setup

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

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

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

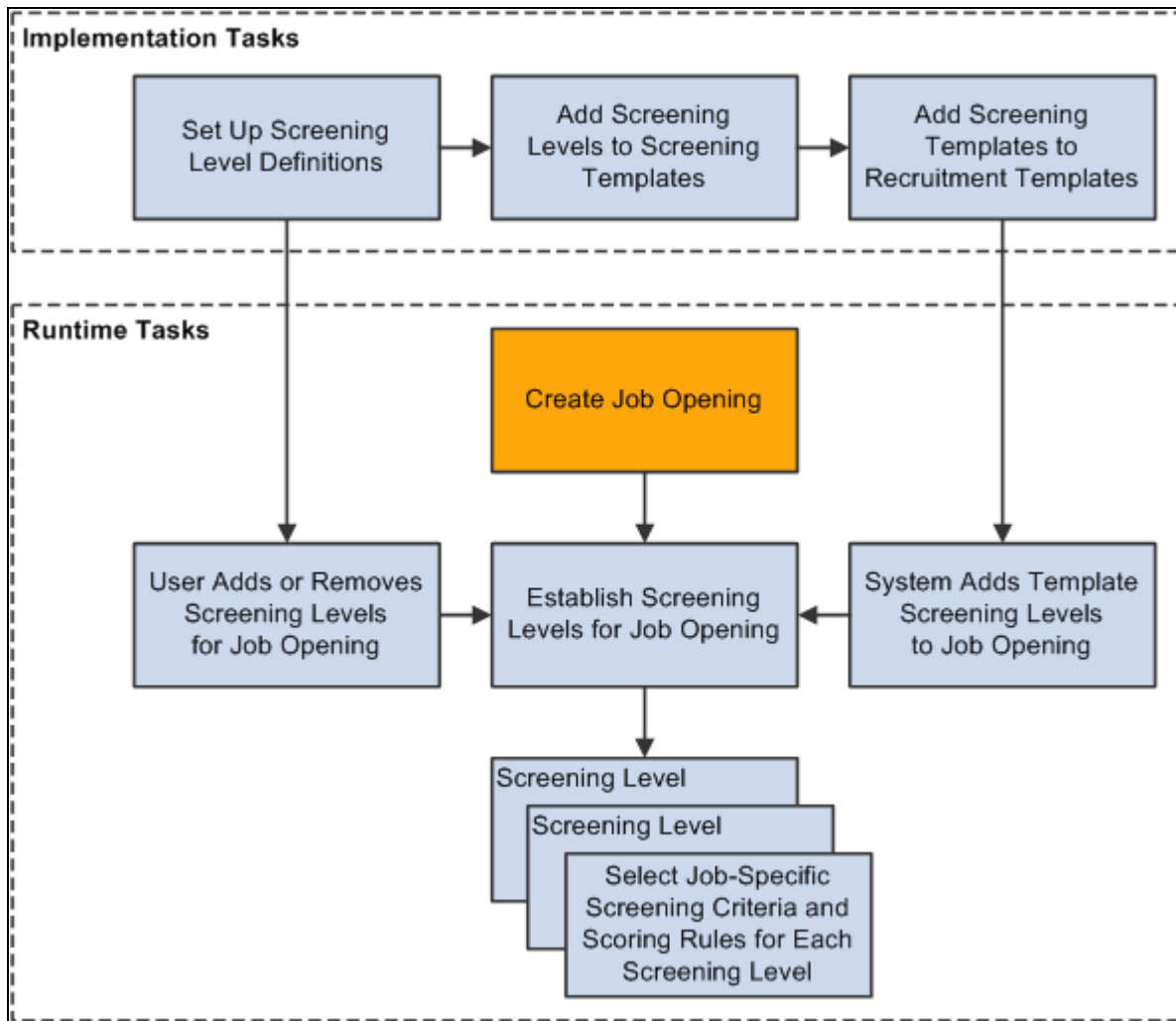
You add one or more screening level definitions to a screening template, and you add one screening template to a recruitment template. Because every job opening is associated with a recruitment template, creating a job opening causes the system to add the appropriate screening levels to the job opening.

See [Chapter 7, "Setting Up Recruiting Templates," Understanding Recruiting Templates, page 113.](#)

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

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

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



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

Process Settings

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

- The threshold for passing the screening level.

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

See [Chapter 10, "Creating Job Openings," Defining Screening Level Rules and Criteria, page 270.](#)

- Dispositions to assign to applicants when applying screening results.

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

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

There are two options for setting the overall score:

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

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

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

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

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

See [Chapter 5, "Setting Up Screening Processes," Understanding Prescreening and Online Screening, page 75.](#)

(USF) U.S. Federal Screening Setup

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

See [Chapter 10, "Creating Job Openings," \(USF\) Understanding U.S. Federal Screening Setup, page 261.](#)

Delivered Screening Levels

Oracle delivers the following screening level definitions:

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

Understanding Prescreening and Online Screening

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

Prescreening

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

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

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

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

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

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

If an applicant applies for more than one job at once, the system merges the prescreening questions from all selected job openings, even if the applicant has previously passed prescreening for a subset of the job openings.

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

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

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

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

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

See [Chapter 7, "Setting Up Recruiting Templates," Setting Up Resume Templates, page 115.](#)

A screening level for prescreening has the following characteristics:

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

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

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

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

Online Screening

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

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

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

A screening level for online screening has the following characteristics:

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

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

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

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

Page Used to Set Up Screening Level Definitions

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|----------------------|------------------------|---|-------------------------------|
| Screening Definition | HRS_SCREEN_TBL | Set Up HRMS, Product Related, Recruiting, Screening, Screening Levels, Screening Definition | Set up screening definitions. |

Setting Up Screening Level Definitions

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

Screening Definition

Screening Level Description

Screening ID: 1002

*Status:

*Description:

Short Description:

Letter:

Pre Screening Online Screening

Status Definition

Pass Status:

Pass Reason:

Pass Message Text ID:

Fail Status:

Fail Reason:

Fail Message Text ID:

Scoring Definition

Assign Points

Percent Needed to Pass: Use Raw Points

Maximum Points to Assign:

Points Assigned for Pass:

Points Assigned for Fail:

Manually Assign Status

Screening Definition page

Screening Level Description

Enter basic information about the screening level.

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

| | |
|---|--|
| Description | The system uses the full description (rather than the short description) to identify the screening level on the various recruiting pages that includes references to screening levels. |
| Letter | <p>Select the default letter to send to applicants who fail this screening level. The letter is added to the queue for the Generate Recruitment Letter (HRSLETTER) process after screening results are applied.</p> <p>The drop-down list box includes all of the letters in the HRS_APP_LET report definition, which includes letters for various purposes. Take care to select the appropriate letter. The sample rejection letter that Oracle delivers is HRS_APP_LETTER_IR.</p> <hr/> <p>Note. Prescreening and online screening levels do not use this setting.</p> <hr/> <p>See Chapter 19, "Managing Applicants," Generating Batch Recruitment Letters, page 602.</p> <p>Users can override this default selection when they configure job-specific criteria for the screening level in the Job Opening Screening Criteria page.</p> |
| Pre Screening and Online Screening | <p>Select one of these check boxes to mark this as a screening level for either prescreening screening or as online screening. You cannot select both check boxes.</p> <p>Leave both check boxes deselected if you are defining a standard screening level.</p> <p>See Chapter 5, "Setting Up Screening Processes," Understanding Prescreening and Online Screening, page 75.</p> |
| | |
| Status Definition | |
| <p>Your choices in these fields provide default values for the equivalent fields on the Job Opening Screening Criteria page (the page where recruiters configure the screening level for a specific job opening). Recruiters can override the default statuses, but not the associated messages.</p> <p>See Chapter 10, "Creating Job Openings," Defining Screening Level Rules and Criteria, page 270.</p> | |
| Pass Status and Pass Reason | Select the default disposition (and, optionally, an associated reason) for the system to assign applicants who pass this screening level. Typically, you assign the <i>Screen</i> disposition for standard screening levels and the <i>Applied</i> disposition for online screening and prescreening levels. |
| Fail Status and Fail Reason | Select the default disposition (and, optionally, an associated reason) for the system to assign applicants who fail this screening level. Typically, you assign the <i>Reject</i> disposition for standard screening levels and the <i>Failed Prescreening</i> disposition for prescreening levels. |

Pass Message Text ID and Fail Message Text ID

If either the Pre Screening or Online Screening check box is selected, select the IDs for the messages that Candidate Gateway presents to applicants who pass and who fail this screening level. If neither check box is selected, leave these fields blank.

Note. Messages are mandatory for prescreening and optional for online screening. Standard screening levels do not use these settings.

Scoring Definition

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

Percent Needed to Pass

Enter the minimum percentage amount of the total possible points for all screening criteria that an applicant must have to pass the screening level.

Note. Unless all questions have the same point value, this percentage is *not* necessarily the same as the percentage of questions that the applicant must answer correctly.

For U.S. federal salaried screening, the first screening level typically requires applicants to achieve 100% to pass.

For U.S. federal hourly screening, the first screening level typically requires applicants to achieve 50% to pass.

For both types of U.S. federal screening, you can typically leave these fields blank for the second screening level, which typically uses transmutation to calculate a score.

Use Raw Points

Select this check box if you want applicant's scores for the screening level to be the total points that the applicant earned by meeting individual screening criteria for this screening level.

If you select this check box, do not enter values in the Points Assigned for Pass and Points Assigned for Fail fields.

Maximum Points to Assign

If you select the Use Raw Points check box, use this field to optionally enter a maximum number of points to assign, regardless of the applicant's raw points.

Points Assigned for Pass and Points Assigned for Fail

Enter scores to assign to all applicants who pass or fail this screening level. Do not enter a value if you are using raw points as the applicant's score.

To assign zero points when an applicant fails the screening level, enter 0 rather than leaving the field blank.

Manually Assign Status

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

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

(USF) Setting Up Preference Programs

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

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

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

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

Understanding Priority Placement Processing

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

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

Priority Placement Processing

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

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

The types of priority processing options are:

- Must Select
- Must Consider
- None

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

See [Chapter 13, "Screening and Routing Applicants," \(USF\) Running the Priority Placement Process, page 383.](#)

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

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

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

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

Delivered Priority Placement Codes

Oracle delivers the following priority placement code settings:

| <i>Priority Placement Code</i> | <i>Weight</i> | <i>Description</i> |
|---------------------------------------|----------------------|---|
| 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 |

Understanding Veterans Preference Codes

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

Veterans Preference Processing

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

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

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

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

Delivered Veterans Preference Codes

Oracle delivers the following veterans preference codes:

| Veterans Preference Code | Recruitment Code | Points | Description |
|---------------------------------|-------------------------|---------------|---|
| 1 | NV | 0 | Designates a nonveteran. |
| 2 | TP | 5 | Five-point preference that is granted to a preference-eligible veteran who does not meet the criteria for one of the types of 10-point preferences listed. |
| 3 | 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. |

Pages Used to Set Up U.S. Federal Screening Processes

| Page Name | Definition Name | Navigation | Usage |
|--------------------|------------------------|---|--|
| Priority Placement | HRS_G_PR_PL_TBL | Set Up HRMS, Product Related, Recruiting, Screening, Priority Placement, Priority Placement | Review and configure priority placement codes. |

| Page Name | Definition Name | Navigation | Usage |
|---------------------------|-------------------|---|---|
| Setup Veterans Preference | HRS_G_VET_PRF_TBL | Set Up HRMS, Product Related, Recruiting, Screening, Veterans Preference, Setup Veterans Preference | Review and configure veterans preference codes. |

(USF) Setting Up Priority Placement Codes

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

The screenshot shows the 'Priority Placement' page with the following details:

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

Priority Placement page

Priority Placement Information

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

Description Identifies the priority placement code. This is the description that users see when adding priority placement codes to applications or job openings.

Priority Placement Weight A value of 1 is the highest weight. During the ranking process, an applicant with a priority placement weight of 1 will be ranked before someone with a priority placement weight of 2.

Job Opening Types

- Recruitment Type** The page lists the three types of job openings so that you can assign different priority placement processing rules for each. The three types of job openings are *Internal*, *Merit Promotion*, and *Open Requisition*.
- Talent Acquisition Manager identifies each of these types of job openings using the Recruitment Type field on the Job Opening page.
- Job Opening Selection Criteria** Select the priority placement processing to give to applicants for each type of job opening. Choose *Must Select*, *Must Consider*, or *None*.

(USF) Setting Up Veterans Preference Codes

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

The screenshot shows the 'Setup Veterans Preference' page. At the top, it indicates 'Veterans Preference: 2'. Below this is a table titled 'Veterans Preference Information' with a search bar and navigation controls. The table contains the following fields:

| Veterans Preference Information | |
|---------------------------------|------------|
| *Effective Date: | 01/01/1900 |
| Status: | Active |
| *Description: | 5 Point |
| Short Description: | 5 Point |
| Recruitment Code: | TP |
| Recruitment Points: | 5 |

Setup Veterans Preference page

Veterans Preference Information

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

Effective Date and Status Veterans preference codes that are currently *Active* are available for use.

Description Identifies the veterans preference code. This is the description that users see when adding veterans preference codes to applications.

- Recruitment Code** Identifies the recruitment code.
See Chapter 5, "Setting Up Screening Processes," Understanding Veterans Preference Codes, page 82.
- Recruitment Points** Enter the number of points that are associated with this veterans preference code.

Chapter 6

Setting Up Additional Recruiting Definitions

This chapter describes how to:

- Set up recruiting roles and security.
- Setting up sites.
- Set up recruiting locations.
- Set up the job posting description library.
- Set up application attachments.
- Set up contact methods.
- Set up interview definitions.
- Set up job offer components.
- Set up the data transfer to HR.

Setting Up Recruiting Roles and Security

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

This section provides an overview of recruiting security and discusses how to identify recruiting roles.

Understanding Recruiting Security

This overview discusses:

- Access to job opening data.
- Access to applicant data.
- Recruiting administrator privileges.

Access to Job Opening Data

The following people have access to job openings:

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

In some circumstances, the members of your recruiting team may not have standard data permission access to the transaction data in the job opening.

To give recruiting team members access to job openings:

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

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

5. Assign the permission list to one or more roles, and assign the roles to those users who need recruiting team access.

When a member of the recruiting team for a particular job opening accesses the job opening, the system determines if the user has a permission list with recruiting team access before granting access to the opening.

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

Access to Applicant Data

The data of applicants who are associated with a job opening is available to those with access to the job opening.

Applicants who are not associated with any job openings are visible to anyone with access to the applicant components.

Recruiting Administrator Privileges

To grant recruiting administrator privileges, associate users with roles that are also associated with the *Recruitment Administrator* recruiting role type. To associate roles with a recruiting role type, use the Recruiting Roles page.

Administrator privileges include:

- Accessing the eligibility & identity information for applicants.
- Accessing a comprehensive list of person profiles in a job opening.

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

- Changing the status of draft applicants.
- Changing the recruitment template on a job opening.
- Editing job opening details when the job opening status is Hold, Cancelled, or Closed.
- Overriding the status of a job opening.
- Cloning job openings.

Users who are associated with any recruiting role type are able to clone job openings.

Page Used to Identify Recruiting Roles

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|------------------|------------------------|---|-------------------------|
| Recruiting Roles | HRS_ROLE_DEFN | Set Up HRMS, Recruiting, Recruiting Roles, Recruiting Roles | Define recruiter roles. |

Identifying Recruiting Roles

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

Recruiter Roles page

Recruiting Role Type The system identifies recruiting users through the user of recruiting roles. There are seven types of recruiting roles, and for each one that you use, you identify one or more associated PeopleSoft Security roles. Users who are associated with any of the PeopleSoft Security roles that you select are then able to participate in the associated recruiting activities.

Users with roles that are associated with the *Recruitment Administrator* role type have privileges including the ability to clone job openings, change the status of draft applicants, change the recruitment template on a job opening, override the status of a job opening, and access the eligibility & identity information for applicants.

The other available role types are *Federal Recruiter*, *Hiring Manager*, *RS Approval Administrator* (recruiting solutions approval administrator), *RS Technical Administrator* (recruiting solutions technical administrator), *Recruiter*, and *Recruiting User*.

Users with roles that are associated with any of these role types are considered recruiters. Recruiters can be added to a job opening hiring team as a recruiter. Recruiters also have access to the clone job opening function on the Job Opening page.

Note. The only role type that carries unique privileges is the recruitment administrator. Other than that, the system does *not* give different privileges to users with different role types.

Association with a recruiting role is *not* required for users to be added to a job opening's hiring team in any capacity other than recruiter. For example, any user can be added as a hiring manager or interviewer, even if that user is not associated with a recruiting role.

Recruiter Roles Select PeopleSoft Security roles to associate with the recruiting role type.

See Also

[Appendix B, "Delivered Permission Lists and Roles for Talent Acquisition Manager," page 713](#)

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.

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 default 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 - Applicants 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 *The Recruiting Solutions Using Sites* red paper on My Oracle Support.

Prerequisites

Before you can set up sites, you must:

- Set up row security.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Administering HRMS Security."

- Set up resume templates.

See [Chapter 7, "Setting Up Recruiting Templates," Setting Up Resume Templates, page 115.](#)

- (Optional) Set up resume extractor vendors.

See [Chapter 8, "Setting Up Recruitment Sources and Third Party Integrations," Setting Up Recruiting Vendors, page 158.](#)

- Set up portal definitions.

See *Enterprise PeopleTools PeopleBook: Internet Technology*, "Administering Portals"

Page Used to Set Up Sites

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

Setting Up Sites

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

Site

Site Setup

Site

Site ID: 1

Description:

Short Description:

***Resume Template:** Default

Applicant Type: ▼

Country: ▼

Default Extractor: ▼

Default Set ID:

Default Portal:

External ERP Site: ▼

Test Links

Internal Link

External Link

Site Setup page

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 in the Setup Resume Template component.

Applicant Type This field is informational only. Select *Employee*, *External Applicant*, or *Non-Employee* to indicate which type of applicant uses this site.

| | |
|---|---|
| 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 resume extractor. The system uses the resume extractor that you specify here to extract information from applicant's resumes. If you do not select a value, applicants can attach resumes but the system cannot extract information from the resumes. Set up resume extractors in 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 (external employee referral program site) | Identify the site where external candidates are directed to view and update information when their application is submitted through an employee referral or automatch search. |
| Test Links | The system uses the specified test links to verify the layout of a particular site and to easily retrieve the full URL path. The separate URLs, Internal Link and External Link, allow the site to be viewed from either an internal employee's perspective or as an external applicant, respectively. |

Setting Up Recruiting Locations

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

Page Used to Set Up Recruiting Locations

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|----------------------|------------------------|--|--|
| Recruiting Locations | HRS_LOCATION | Set Up HRMS, Product Related, Recruiting, Recruiting Locations, Recruiting Locations | Define recruiting locations by grouping company locations into geographic units. |

Defining Recruiting Locations

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

Recruiting Locations

Location Details

Recruiting Location:

***Status:**

***Description:**

Short Description:

| Location Customize Find First 1-4 of 4 Last | | | | | |
|---|----------------------|---------------------|----------------------|-------------|-----|
| | Location | Description | Recruiting Location | Description | |
| 1 | <input type="text"/> | | 1120 | West | + - |
| 2 | <input type="text"/> | | 1125 | Midwest | + - |
| 3 | <input type="text"/> | | 1130 | East | + - |
| 4 | L0001 | Northeastern Region | <input type="text"/> | | + - |

Recruiting Locations page

You associate job openings with recruiting locations to help applicants who want to narrow their job search geographically. Recruiting locations can be as broad or narrow as you like, and can contain other recruiting locations as well as actual company locations.

Location or Recruiting Location In each row, select either a company location or another recruiting location that belongs to the recruiting location you are defining.

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

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up Organization Foundation Tables," Establishing Locations.

Setting Up the Job Posting Description Library

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

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

- Define posting description types.
- Create posting descriptions.

Understanding the Job Posting Description Library

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

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

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

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

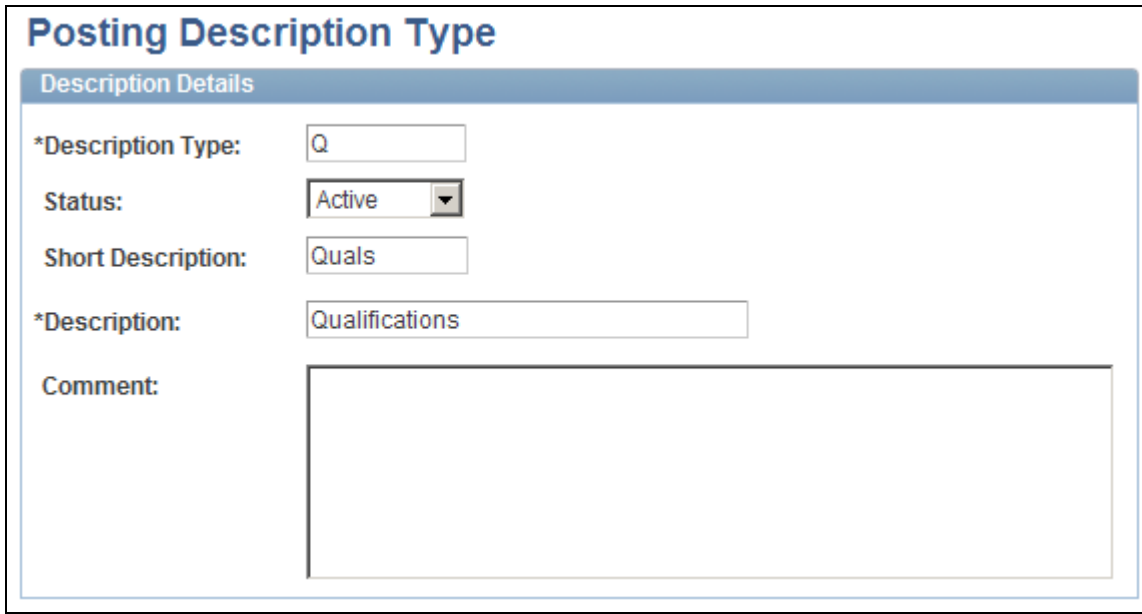
When you create a library entry, you associate it with a specific description type.

Pages Used to Set Up the Job Posting Description Library

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

Defining Posting Description Types

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



The screenshot shows a web form titled "Posting Description Type". Below the title is a section header "Description Details". The form contains the following fields:

- *Description Type:** A text input field containing the letter "Q".
- Status:** A dropdown menu with "Active" selected.
- Short Description:** A text input field containing the word "Quals".
- *Description:** A text input field containing the word "Qualifications".
- Comment:** A large, empty text area.

Posting Description Type page

Creating Posting Descriptions

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

Posting Description Library

Description Details

Description Type: | Other Information

Description ID: 002

***Description Label:**

Description:

Identification of promotion potential in this position does not constitute a commitment or an obligation on the part of management to promote the employee selected at some future date.

Promotion will depend upon administrative approval and the continuing need for an actual assignment and performance of higher level duties.

Posting Description Library page

Description Label Enter the text to be used as a section label in the job posting.

Description Enter content for this library entry. Content can include text and graphics, and can be formatted to enhance the presentation of your content.

Setting Up Application Attachments

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

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

Understanding Attachment Types

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

For each attachment types, you indicate the maximum number of attachments per application, and you identify the directory where those documents are stored.

PeopleSoft delivers the following attachment types:

- Resume.
- Reference.
- Transcripts.
- Cover letters.
- Personal References.
- Professional References.

See Also

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

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

Page Used to Set Up Application Attachments

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

Defining Attachment Types

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

Attachment Types

Attachment Type Code: 001

Attach Details

| | |
|---------------------------------------|--|
| *Status: | <input type="text" value="Active"/> |
| *Description: | <input type="text" value="Resume attachments"/> |
| Short Description: | <input type="text" value="Resumes"/> |
| Maximum Occurrences/Applicant: | 1 |
| *URL Identifier: | <input type="text" value="HRS_APP_ATCH"/> Edit |
| URL: | RECORD://HRS_ATTACHMENTS |
| *Processing Type: | <input type="text" value="Resume"/> |

Attachment Type Setup page.

Maximum Occurrences/Applicant Enter the maximum number of attachments that an applicant can submit for this specific attachment type. When the processing type is *Resume*, the maximum is 1, and this field is not enterable.

URL Identifier Select the URL address that will house the documents for this attachment type.

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

URL Displays the URL address for the selected URL identifier.

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

There can be only one attachment type for each of these processing types: *Resume*, *Reference*, and *OIF Other*.

For the *Resume* attachment type, the Maximum Occurrences/Applicant value must be 1, indicating that an applicant can upload only one resume per application.

To create additional classifications of attachments, use the *Other* processing type. For example, attachment types for cover letters or transcripts have this processing type.

Setting Up Contact Methods

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

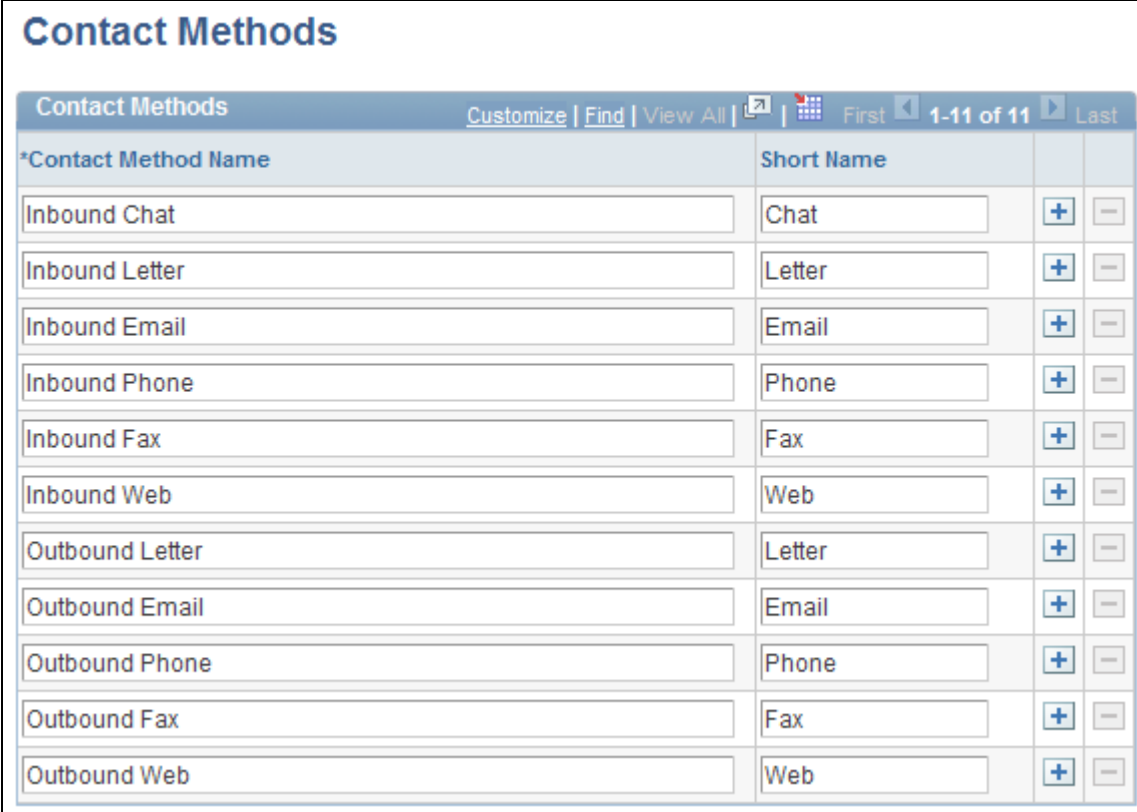
This section provides an overview of recruitment letters and discusses how to define contact method types.


Page Used to Set Up Contact Methods

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

Defining Contact Method Types

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



| Contact Methods | | Customize Find View All  | | First | 1-11 of 11 | Last |
|----------------------|------------|--|--|-------|------------|------|
| *Contact Method Name | Short Name | | | | | |
| Inbound Chat | Chat | <input data-bbox="1250 997 1274 1029" type="button" value="+"/> | <input data-bbox="1299 997 1323 1029" type="button" value="-"/> | | | |
| Inbound Letter | Letter | <input data-bbox="1250 1050 1274 1081" type="button" value="+"/> | <input data-bbox="1299 1050 1323 1081" type="button" value="-"/> | | | |
| Inbound Email | Email | <input data-bbox="1250 1102 1274 1134" type="button" value="+"/> | <input data-bbox="1299 1102 1323 1134" type="button" value="-"/> | | | |
| Inbound Phone | Phone | <input data-bbox="1250 1155 1274 1186" type="button" value="+"/> | <input data-bbox="1299 1155 1323 1186" type="button" value="-"/> | | | |
| Inbound Fax | Fax | <input data-bbox="1250 1207 1274 1239" type="button" value="+"/> | <input data-bbox="1299 1207 1323 1239" type="button" value="-"/> | | | |
| Inbound Web | Web | <input data-bbox="1250 1270 1274 1302" type="button" value="+"/> | <input data-bbox="1299 1270 1323 1302" type="button" value="-"/> | | | |
| Outbound Letter | Letter | <input data-bbox="1250 1323 1274 1354" type="button" value="+"/> | <input data-bbox="1299 1323 1323 1354" type="button" value="-"/> | | | |
| Outbound Email | Email | <input data-bbox="1250 1375 1274 1407" type="button" value="+"/> | <input data-bbox="1299 1375 1323 1407" type="button" value="-"/> | | | |
| Outbound Phone | Phone | <input data-bbox="1250 1428 1274 1459" type="button" value="+"/> | <input data-bbox="1299 1428 1323 1459" type="button" value="-"/> | | | |
| Outbound Fax | Fax | <input data-bbox="1250 1491 1274 1522" type="button" value="+"/> | <input data-bbox="1299 1491 1323 1522" type="button" value="-"/> | | | |
| Outbound Web | Web | <input data-bbox="1250 1543 1274 1575" type="button" value="+"/> | <input data-bbox="1299 1543 1323 1575" type="button" value="-"/> | | | |

Contact Methods page

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

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

Setting Up Interview Definitions

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

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

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

Understanding Interview Definitions

Set up these three types of definitions for interviews:

- Interview types categorize the interview.

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

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

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

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

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

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

See [Chapter 7, "Setting Up Recruiting Templates," Setting Up Interview Evaluation Templates, page 144.](#)

Pages Used to Set Up Interview Definitions

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|------------------|------------------------|---|-------------------------|
| Interview Types | HRS_INT_LVL_TBL | Set Up HRMS, Product Related, Recruiting, Screening, Interview Types, Interview Types | Create interview types. |

| Page Name | Definition 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. |

Creating Interview Types

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

The screenshot shows the 'Interview Types' page with the following details:

- Interview Type:** C
- Interview Levels:** Find | View All | First | 1 of 1 | Last
- *Effective Date:** 01/01/1900 (with a calendar icon)
- *Status:** Active (dropdown menu)
- *Description:** Campus
- Short Description:** Campus

Interview Types page

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

Creating Interview Evaluation Categories

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

Interview Evaluation Category page

Creating Interview Ratings

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

Interview Evaluation Ratings page

Score Enter a score for this evaluation rating.

Setting Up Job Offer Components

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

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

- Create job offer component types.

- Enter job offer component information.

Understanding Job Offer Setup

This section provides an overview of job offer setup.

Components of Pay

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

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

See [Chapter 15, "Making Job Offers," page 469](#).

Attachments for Online Job Offers

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

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

The attachments framework categorizes attachments as one of three types:

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

To set up job offer attachments using the attachments framework:

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

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

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

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

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

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

Pages Used to Set Up Job Offers

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

Creating Job Offer Component Types

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

Offer Component Type

Offer Type: K000001

Offer Component Type
Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900 + -

*Status: Active ▼

*Description: Base

Short Description: Base

Role Name: 🔍

Base Salary Indicator

Offer Component Type page

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

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

See *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 (Set Up HRMS, Product Related, Recruiting, Offer Component, Offer Component).

Offer Component

Offer Component: K000001

| Offer Component | Find | View All | First | 1 of 1 | Last |
|--------------------|-------------|----------|-------|--------|-------------------------------|
| *Effective Date: | 01/01/1900 | | | | |
| *Status: | Active | | | | |
| *Description: | Base Salary | | | | |
| Short Description: | Base Sal | | | | |
| *Offer Type: | Base | | | | <input type="checkbox"/> Cash |
| Frequency: | Monthly | | | | |
| Currency Code: | USD | | | | US Dollar |

Offer Component page

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

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

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

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

See Also

[Chapter 16, "Hiring Applicants," Hiring Applicants, page 504](#)

Page Used to Set Up the Data Transfer to HR

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

Defining Data to Transfer to HR

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

Manage Hire Setup

This setup will determine what information is sent from the applicant's recruitment record to their employee record in Human Resources. Select the checkbox if the information should be sent to Human Resources.

Type of Hire:

Person
 Profile
 Other

| Person | |
|-----------------|-------------------------------------|
| Description | Transfer To HR |
| Person | <input checked="" type="checkbox"/> |
| National ID | <input checked="" type="checkbox"/> |
| Addresses | <input checked="" type="checkbox"/> |
| Diversity | <input checked="" type="checkbox"/> |
| Person Names | <input checked="" type="checkbox"/> |
| Offer Letter | <input checked="" type="checkbox"/> |
| Email Addresses | <input checked="" type="checkbox"/> |
| Phones | <input checked="" type="checkbox"/> |

Manage Hire Setup page

Type of Hire

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

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

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

On the Person tab, available options include personal information such as name, national ID, addresses, email addresses, and phone numbers.

There is also a check box to select if you want users to be able to send offer letters along with other applicant information. Specifically, selecting the Offer Letter check box causes the system to display a Send Offer Letter to HR check box on the Prepare for Hire page. Users must explicitly select that check box (which is deselected by default) to include the offer letter in the message to the HR system.

Important! If you select the Offer Letter check box the system does *not* automatically send the letter. Instead, the system gives users the option of sending the offer letter when preparing specific applicants for hire.

See [Chapter 16, "Hiring Applicants," Preparing for Hire, page 509](#).

Profile

Select the Profile tab.

| Profile Types | | |
|---------------------------|-------------------------------------|--|
| Description | Transfer To HR | |
| Areas of Study | <input checked="" type="checkbox"/> | |
| Competencies | <input checked="" type="checkbox"/> | |
| Degrees | <input checked="" type="checkbox"/> | |
| School Education | <input checked="" type="checkbox"/> | |
| E&G Special Projects | <input checked="" type="checkbox"/> | |
| Elements | <input checked="" type="checkbox"/> | |
| Geographic Preferences | <input checked="" type="checkbox"/> | |
| Honors and Awards | <input checked="" type="checkbox"/> | |
| International Preferences | <input checked="" type="checkbox"/> | |
| Licenses & Certifications | <input checked="" type="checkbox"/> | |
| Language Skills | <input checked="" type="checkbox"/> | |
| Current Location | <input checked="" type="checkbox"/> | |
| Location Preferences | <input checked="" type="checkbox"/> | |
| Memberships | <input checked="" type="checkbox"/> | |
| Responsibilities | <input checked="" type="checkbox"/> | |

Manage Hire Setup page: Profile tab

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

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

Other

Select the Other tab.

| Other | |
|--------------------------------|-------------------------------------|
| Description | Transfer To HR |
| Eligibility/Identity | <input checked="" type="checkbox"/> |
| Identification Data | <input checked="" type="checkbox"/> |
| Prior Work Experience | <input checked="" type="checkbox"/> |
| Accommodation | <input checked="" type="checkbox"/> |
| Training | <input checked="" type="checkbox"/> |
| Contract Data | <input checked="" type="checkbox"/> |
| Appl/Person Assignment Chklist | <input checked="" type="checkbox"/> |
| Applicant/Employment Contracts | <input checked="" type="checkbox"/> |
| Bank Accounts | <input checked="" type="checkbox"/> |
| Disabilities | <input checked="" type="checkbox"/> |

Manage Hire Setup page: Other tab

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

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

Chapter 7

Setting Up Recruiting Templates

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

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

Understanding Recruiting Templates

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

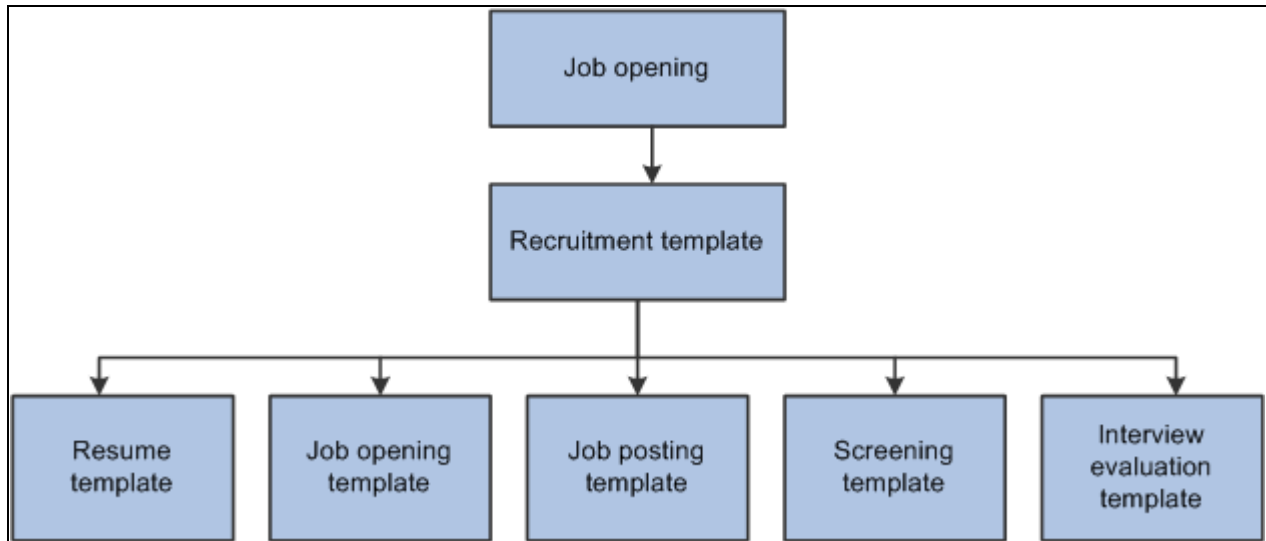
Template Types

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

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

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

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



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

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

See [Chapter 6, "Setting Up Additional Recruiting Definitions," Setting Up Sites, page 90.](#)

Recruitment Templates and Job Openings

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

Available segmenting types are:

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

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

See [Chapter 10, "Creating Job Openings," Limited Profile Integration, page 215.](#)

- *Salary Grade.*

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

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

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

Template Modifications

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

Setting Up Resume Templates

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

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

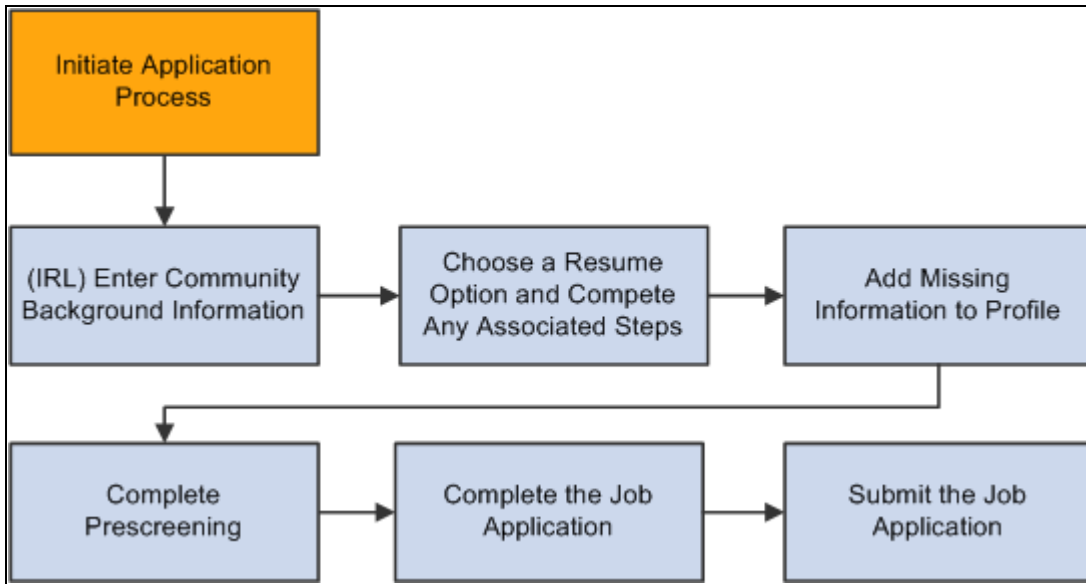
- Define basic information for resume templates.
- Define resume template pages and sections.
- (IRL) Define requirements for community background information.
- Define prescreening settings for online applications without job openings
- Set point values for prescreening questions.

Understanding Resume Templates

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

The Online Application Process

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



Process flow for using Candidate Gateway to submit an application.

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

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

| Steps to Complete an Online Application | Resume Template Notes |
|---|--|
| 1. Initiate the application process. | The system selects one or more resume templates depending on whether the applicant applied for one job opening, many job openings, or applied without selecting a job opening. See Chapter 7, "Setting Up Recruiting Templates," Runtime Selection of a Resume Template, page 117. |
| 2. (IRL) Enter community background information. | This step occurs only if at least one of the selected resume templates is configured to require community background information for Ireland. See Chapter 7, "Setting Up Recruiting Templates," (IRL) Community Background Information, page 121. |
| 3. Choose a resume option and compete any associated steps. | This step occurs because all resume templates must have the Choose Resume page as the first page in their structure definition, and the page must include one or more of the four predefined resume options. Resume options are ways that the applicant can provide a resume—for example, by uploading a file or pasting resume text into a field. See Chapter 7, "Setting Up Recruiting Templates," Resume Template Pages, page 118. |
| 4. Add missing information to profile. | This step occurs because all resume templates must have the Contact Details page as the second page in their structure definition. This page always includes the same four sections for applicant names, phone numbers, addresses, and email addresses. If applicants have already provided the minimum required information (a first and last name), the system skips this step during the application process. |

| Steps to Complete an Online Application | Resume Template Notes |
|--|--|
| <p>5. Complete prescreening.</p> <p>Note. An applicant who fails prescreening does not continue to the next step.</p> | <p>Resume templates don't list prescreening as a template page; the system automatically inserts this step at this point in the sequence of template pages.</p> <p>If the applicant selected job openings before applying, this step occurs if any of the job openings include a screening level for prescreening.</p> <p>If the applicant applied without selecting a job opening, this step occurs only if the default resume template for the site includes prescreening settings.</p> <p>See Chapter 7, "Setting Up Recruiting Templates," Prescreening Settings, page 121.</p> |
| <p>6. Complete the job application.</p> | <p>During this step, the applicant sees the rest of the template pages from the resume template's structure definition. These are rendered as links on a Candidate Gateway page; clicking the links displays the sections that are associated with the template page. The resume template controls whether applicants can click any link at any time or whether they must go through the template pages in order.</p> <p>The Candidate Gateway page that displays the links to the template pages also includes links to the resume and profile information that were provided earlier as well as a button for submitting the application.</p> <p>See Chapter 7, "Setting Up Recruiting Templates," Resume Template Pages, page 118.</p> |
| <p>7. Submit the job application.</p> | <p>During this step, the system requires the applicant to accept your organization's employment terms before it accepts the submission. Acceptance is mandatory, and is not part of the resume template definition. (The text of the employment terms message comes from the text catalog.) The system also requests self-identification details from external applicants who are applying for jobs with U.S. companies, but applicants can ignore this request or explicitly decline to provide those details.</p> |

Runtime Selection of a Resume Template

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

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

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

During the merge process, the system:

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

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

Resume Template Pages

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

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

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

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

Apply Now

Complete Application

Jobs you applied for

| | |
|--|--|
| Posting Title | |
| Sales Product Consultant - Delaware Area | |

Fred Fredricks Resume

Fred Fredricks

[Edit Profile](#)

◀ Previous

[Careers Home](#)
Next ▶

Preferences [Education and Work Experience](#) [Referral Information](#)

Use this section to tell us what you are looking for in terms of location, working time and type of job.

Preferences

| | | |
|------------------------------|-------------------------------------|-----------------------------------|
| Desired Start Date: | <input type="text" value=""/> | <input type="button" value="B1"/> |
| Are you willing to relocate? | <input type="text" value="No"/> | |
| Are you willing to travel? | <input type="text" value="No"/> | |
| Travel Percentage: | <input type="text" value=""/> | |
| Regular/Temporary: | <input type="text" value="Either"/> | |

Desired Work Days

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

Resume Template Sections

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

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

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

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

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

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

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

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

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

- Education History
- Federal Preferences
- Federal Priority Placement
- Military Rank and Service
- Online Questionnaire
- Personal Information
- Preferences
- References
- Referrals
- Training
- Work History

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

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

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

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

See [Chapter 11, "Entering Applicant Data," Adding Eligibility and Identity Information, page 334.](#)

Prescreening Settings

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

See [Chapter 5, "Setting Up Screening Processes," Understanding Prescreening and Online Screening, page 75](#)

:

Setting up prescreening in a resume template serves two purposes:

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

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

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

To set up prescreening for a resume template:

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

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

See [Chapter 5, "Setting Up Screening Processes," Setting Up Screening Level Definitions, page 72.](#)

2. Create the list of screening questions.

Prescreening questions must be multiple choice because the system cannot evaluate answers to open-ended questions.

Prerequisites

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

See Also

[Chapter 3, "Setting Up Profile Integration," Choosing the Primary Person Profile Type for Recruiting, page 26](#)

Pages Used to Set Up Resume Templates

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|---------------------|------------------------|---|--|
| 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. |

| Page Name | Definition Name | Navigation | Usage |
|--------------------------------|--------------------|---|--|
| Pre Screening | HRS_RES_TMPL4 | Set Up HRMS, Product Related, Recruiting, Templates, Resume Template, Pre Screening | Define prescreening settings, including processing rules and prescreening questions. |
| Answers to Screening Questions | HRS_RES_ANSWER_SEC | Click the View Answers link on the Pre Screening page. | Review the correct and incorrect answers to a prescreening question, and assign points to each answer. |

Defining Basic Information for Resume Templates

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

The screenshot shows the 'Template Definition' page with the following fields and values:

- Resume Template ID:** 1000
- *Effective Status:** Active (dropdown menu)
- *Description:** Default
- *Short Description:** Default
- Status Date:** 06/17/2004 (with a calendar icon)

Template Definition page

Resume Template ID Template IDs are automatically assigned when you create the template.

Effective Status and Status Date Indicate whether the definition is *Active* or *Inactive* and the date that the status was assigned. Only active templates are available for selection in recruitment templates. The system displays a warning if you attempt to inactivate a template that is used in a recruitment template.

Description Enter an identifying name for this template. A descriptive name helps you when you reference the template from within a recruitment template or site definition.

Defining Resume Template Pages and Sections

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

Template Sections page

Enforce Linear Application

Select this check box to have the system enforce the order in which an applicant completes pages when they apply for jobs online. For example, if there are four page links on the Complete Application page, only the first page link is active when the applicant first reaches that page. The user must click the Next link to access the second page.

If this check box is not selected, all page links on the Complete Application page are active and the applicant can access the pages in any order.

See [Chapter 7, "Setting Up Recruiting Templates," Template Pages, page 125.](#)

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 the check boxes for types of information that you want to ask applicants to provide.

Referrals

Referral Source Required

Select this check box to force applicants to specify a referral source when submitting an application using this template.

If an applicant tries to submit an application without the required information, the system forces the applicant to either enter the missing information, save the application as a draft, or abandon the application.

This setting applies only to applications that are submitted while the check box is selected: applications that are created when this check box is not selected will *not* require a referral source later on, even if the check box is selected after the application has been submitted.

Referral Subsource Required

Select this check box to force applicants to specify a referral subsource when submitting an application using this template. This check box is available only when the Referral Source Required check box is selected.

The system does not validate the existence of valid subsource data when you select this check box. However, even if this check box is selected, the system will allow an applicant to submit an application without a subsource if there are no subsources for the selected referral source.

See [Chapter 8, "Setting Up Recruitment Sources and Third Party Integrations," Setting Up Recruitment Sources, page 181.](#)

Template Pages

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

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

Page Title

Select a text catalog entry to use as the page title. Only text IDs with HRAM (RS Applicant Manager) as the object owner identifier are available for selection.

Page titles for all pages other than the first two appear as links on the Complete Application page. Applicants click the links to access the page and view its sections.

Note. The first two pages in the template are rendered as pages in the Careers component in Candidate Gateway, not as links on the Complete Application page. Therefore, the page titles that you select here does not affect what the applicant sees. To modify the actual page titles in Candidate Gateway, you need to modify the title text in the text catalog. The delivered the page titles are *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 several predefined sections in addition to the content types that you create for use in job openings and applications.

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

(IRL) Defining Requirements for Community Background Information

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

| | | | |
|---|---------|--------------|------------|
| Template Definition | | | |
| Resume Template ID: | 1000 | Status Date: | 06/17/2004 |
| Description: | Default | | |
| Community Background - Northern Ireland | | | |
| <input type="checkbox"/> Use Community Background | | | |

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.

Defining Prescreening Settings for Applications Without Job Openings

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

| Template Definition | | Template Sections | | Country Specific | | Pre Screening | |
|---|------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------|---------------|--|
| Template Definition | | | | | | | |
| Resume Template ID: | 2005 | Status Date: | 01/01/2000 | | | | |
| Description: | Pre Screening template | | | | | | |
| Screening Definition | | | | | | | |
| Pass Message Text ID: | HRAM_CEONLPASS_01 | <input checked="" type="checkbox"/> | Pass Email Flag | | | | |
| Fail Message Text ID: | HRAM_CEONLFAIL_01 | <input checked="" type="checkbox"/> | Fail Email Flag | | | | |
| Explain Text ID: | HRAM_CEONLEMSG_01 | | | | | | |
| Status Definition | | | | | | | |
| Pass Status: | Applied | Pass Reason: | | | | | |
| Fail Status: | Reject Onl | Fail Reason: | Failed Onl | | | | |
| Scoring Definition | | | | | | | |
| Percent Needed to Pass | | | | | | | |
| Percent Needed to Pass: | 100 | <input type="checkbox"/> | Use Raw Points | | | | |
| Maximum Points to Assign: | | | | | | | |
| Points Assigned for Pass: | | Points Assigned for Fail: | | | | | |
| Screening Questions | | | | | | | |
| *Question | View Answers | Question Order | Use in Screening | Required | Points | | |
| Overtime | View Answers | 1 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 1 | | |
| Eligible to possess a fir | View Answers | 2 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 1 | | |
| + Add Screening Questions | | Maximum Total Points: | | | | 2 | |

Pre Screening page

Screening Definition Messages

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

Status Definition

- Pass Status and Pass Reason** Select the default disposition (and, optionally, an associated reason) for the system to assign applicants who pass this screening level. Typically, you assign the *Screen* disposition.
- Fail Status and Fail Reason** Select the default disposition (and, optionally, an associated reason) for the system to assign applicants who fail this screening level. Typically, you assign the *Reject* disposition.

Scoring Definition and Percent Needed to Pass

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

| | |
|---|---|
| Percent Needed to Pass | Enter the minimum percentage amount of the total possible points that an applicant must have to pass the screening level. If the applicant must correctly answer all prescreening questions, enter 100%. |
| Use Raw Points, Maximum Points to Assign, Points Assigned for Pass. and Points Assigned for Fail | <p>These fields are the same as those on the Screening Definition page</p> <p>See Chapter 5, "Setting Up Screening Processes," Setting Up Screening Level Definitions, page 78.</p> <p>Use these fields to assign a candidate points on successful completion of a screening level. This point assignment is relevant when the score helps you evaluate the applicant, or if the points that an applicant accumulates over multiple screening levels are considered together (for example, during the U.S. Federal screening process). However, prescreening points are not typically used after the immediate determination of whether the applicant has passed or failed. In this situation, you can leave all of these fields blank.</p> |
| Screening Questions | |
| Question | Select multiple-choice questions to include in the prescreening questionnaire. Prescreening questions must be multiple choice because the system cannot evaluate answers to open-ended questions. |
| View Answers | Click to access the Answers to Screening Questions page, where you can review the possible answers to the question, see which answers are correct, and update the point values for the answers. |
| Order Number | Enter numbers for each question to establish the order in which they appear in the questionnaire. Because this field accepts only integers, consider using non-consecutive numbers to make it easier to insert additional questions in between existing questions. |
| | <hr/> <p>Note. If the Randomize Screening Questions field on the Recruiting Installation - Jobs page has a <i>Yes</i> value, then the system disregards the question order and presents questions to applicants in random order.</p> <hr/> |
| Use in Screening | Select to include the question in the prescreening questionnaire. Because this page lists only the questions that you use for prescreening, you normally select this check box for all of the questions in the grid. |
| Required | <p>Select to indicate that a correct answer to the question is required in order for the applicant to pass the screening process.</p> <p>An applicant who does not provide the correct answer for a required question fails the screening level regardless of whether the applicant has an otherwise passing score.</p> |
| Points | <p>Displays the point value of the correct answer or, if the question has more than one correct answer, the sum of the point values for all correct answers.</p> <p>To ensure correct processing, make sure that each question has a point value. Use the View Answers link if you need to assign or update point values.</p> |

Maximum Total Points Displays the sum of the point values for all questions in the Screening Questions grid.

Add Screening Questions Click this link to add another row to the Screening Questions grid.

Setting Point Values for Prescreening Questions

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

Answers to Screening Questions

Question ID:
Are you willing to work overtime periodically ?

| Answers | | |
|--------------------|-------------------------------------|---|
| Answer Description | Correct Answer | Points |
| No | <input type="checkbox"/> | <input style="width: 50px;" type="text"/> |
| Yes | <input checked="" type="checkbox"/> | <input style="width: 50px; text-align: center;" type="text" value="1"/> |

Answers to Screening Questions page

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

Setting Up Job Opening Templates

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

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

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

Understanding Job Opening Templates

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

Job Opening Template Pages

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

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

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

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

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

Create New Job Opening

Job Opening

Posting Title: Administrative Assistant
 Job Opening Status: 005 Draft
 Job Title: Assistant-Administrative Job Code: 170005
 Position Number: 19000018 Administrative Assistant
 Business Unit: GBIBU Global Business Institute BU
 Job Family: KADMIN Administrative Support

Save and Open Save as Draft Cancel Previous Step [Next Step](#)

Job Details Qualifications Screening Job Postings Hiring Team

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

Job Opening

 [Print Job Opening](#)

| | | | |
|----------------------------|------------------------------------|------------------------|----------|
| Posting Title: | Administrative Assistant | Job Opening ID: | 30004 |
| Job Opening Status: | 010 Open | Job Type: | Standard |
| Job Title: | Assistant-Administrative | Job Code: | 170005 |
| Position Number: | 19000018 Administrative Assistant | | |
| Business Unit: | GBIBU Global Business Institute BU | | |
| Job Family: | | | |

 [Save](#)
 [Clone](#)
 [Create New](#)
[Previous Job Opening](#)
[Next Job Opening](#)
[Job Opening List](#)

Manage Applicants
Find Applicants
Activity & Attachments
Job Opening Details

Job Details
[Qualifications](#)
[Screening](#)
[Job Postings](#)
[Hiring Team](#)

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

Job Opening Template Sections

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

See [Chapter 10, "Creating Job Openings," Entering Basic Job Information, page 228.](#)

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

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

- Profile content types.

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

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

- Predefined recruiting sections.

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

The following table lists the predefined sections:

| Section Name | Section Contents | Reference |
|--|---|--|
| Education and Experience. | A matrix showing how much experience is required for candidates with differing levels of education. | See Chapter 10, "Creating Job Openings," Adding Job Qualifications , page 246. |
| Job Information. Note. This is required to be the first section on the first page in the template. | Basic information about the job opening. | See Chapter 10, "Creating Job Openings," Opening Information , page 231. |
| Job Postings. | A list of existing job postings and links for creating or modifying job postings. | See Chapter 10, "Creating Job Openings," Creating Job Postings , page 278. |
| Profile Details. Note. This option is available only if profile integrations is activated on the Recruiting Installation - General page. | A list of profiles that are associated with the job opening. | See Chapter 10, "Creating Job Openings," Reviewing Profile Usage , page 247. |
| Salary Information. | Salary information such as the salary plan, salary grade and step ranges, salary range, pay frequency, and currency. | See Chapter 10, "Creating Job Openings," Salary Information , page 245. |
| Screening Options. | A list of screening levels, and fields for defining certain screening processing rules. | See Chapter 10, "Creating Job Openings," Defining Job Opening Screening Levels , page 265. |
| Screening Questions. | A list of screening questions. | See Chapter 10, "Creating Job Openings," Adding Screening Questions to a Job Opening , page 252. |
| Staffing Information. | Job information such as the full-time/part-time, regular/temporary, begin and end dates, work period and the hours worked per work period, and travel percentage. | See Chapter 10, "Creating Job Openings," Staffing Information , page 243. |
| Works Council Information. | A Works Council ID field for identifying the works council for the job opening. The Works Council section is only available for selection if you select the Optional Works Council option on the Recruiting Installation - General page. | See Chapter 10, "Creating Job Openings," Works Council Information , page 236. |

| Section Name | Section Contents | Reference |
|--|--------------------------------------|---|
| Recruiter Assignments. Hiring Manager Assignments. Interviewer Assignments. Interested Party Assignments. Screening Notification Team. | A list of assignees or team members. | See Chapter 10, "Creating Job Openings," Identifying Recruiting Team Members for a Job Opening, page 284. |

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

Prerequisites

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

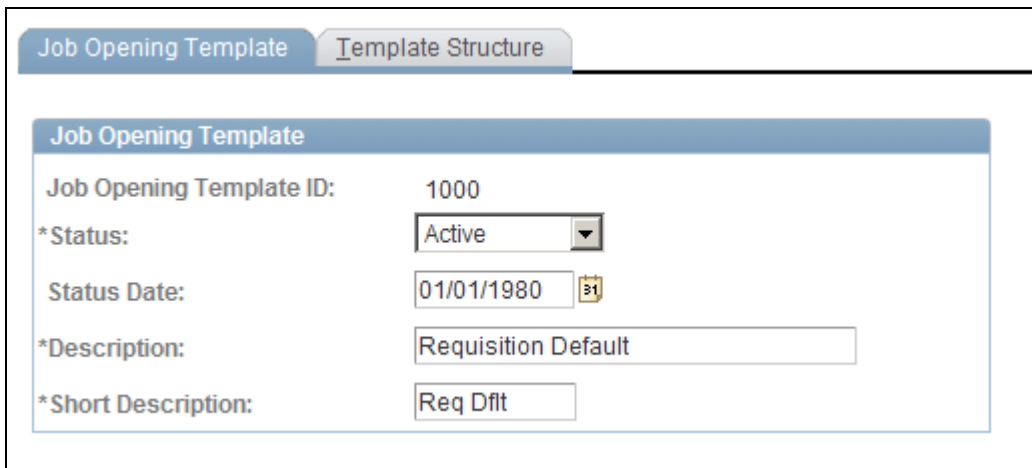
See [Chapter 2, "Defining Installation Options for Recruiting," Defining General Settings for Templates, Approvals, and Integrations, page 11.](#)

Pages Used to Set Up Job Opening Templates

| Page Name | Definition Name | Navigation | Usage |
|-------------------------|------------------------|---|--|
| Job Opening Template | HRS_JO_TMPL_DESCR | Set Up HRMS, Product Related, Recruiting, Templates, Job Opening Template, Job Opening Template | Identify job opening templates. |
| Template Structure page | HRS_JO_TMPL_STRUCT | Set Up HRMS, Product Related, Recruiting, Templates, Job Opening Template, Template Structure | Define job opening template structure. |

Entering Identifying Information for Job Opening Templates

Access the Job Opening Template page (Set Up HRMS, Product Related, Recruiting, Templates, Job Opening Template, Job Opening Template).



The screenshot shows a web interface for configuring a Job Opening Template. At the top, there are two tabs: "Job Opening Template" and "Template Structure", with "Template Structure" being the active tab. Below the tabs is a form titled "Job Opening Template" with the following fields:

- Job Opening Template ID:** 1000
- *Status:** Active (dropdown menu)
- Status Date:** 01/01/1980 (calendar icon)
- *Description:** Requisition Default
- *Short Description:** Req Dflt

Job Opening Template page

Job Opening Template ID Template IDs are automatically assigned when you create the template.

Status and Status Date Indicate whether the definition is *Active* or *Inactive* and the date that the status was assigned. Only active templates are available for selection in recruitment templates. The system displays a warning if you attempt to inactivate a template that is used in a recruitment template.

Description Enter an identifying name for this template. A descriptive name helps you when you reference the template from within a recruitment template.

Defining Job Opening Template Structure

Access the Template Structure page (Set Up HRMS, Product Related, Recruiting, Templates, Job Opening Template, Template Structure).

Job Opening Template | **Template Structure**

Job Opening Template

Description: Requisition Default
Status: Active
Status Date: 01/01/1980
Default Question Set:

Job Opening Template

***Description:**

***Page Number:**

Job Opening Page Content

| *Section | |
|----------------------|--|
| Job Information | |
| Staffing Information | |
| Salary Information | |

[+ Add Sections](#)

***Description:**

***Page Number:**

Job Opening Page Content

| *Section | |
|--------------------------|--|
| Education and Experience | |
| Screening Question | |
| Areas of Study | |
| Competencies | |

Template Structure page

Note. This illustration shows only part of the page.

| | |
|-----------------------------|---|
| Default Question Set | <p>Optionally, enter a question set whose questions will be automatically loaded into job openings that you create using this template. Users can still add and remove questions from the job opening, this option simply streamlines data entry when you use a standard set of questions for all job openings based on the template.</p> <p>Changes made to the question set, or the association of a different question set ID with the template, will not impact job openings that have already been created. Any changes to the template or the question set will apply to new job openings only.</p> <hr/> <p>Note. When a job opening is cloned, the new job opening does not load questions from this default question set. Instead, the system copies the questions from the original job opening.</p> <hr/> |
|-----------------------------|---|

Job Opening Template

| | |
|--------------------|---|
| Description | Enter a title for the template page. This title appears on the corresponding tab (when creating a job opening) or tab section (when accessing an existing job opening). |
| Page Number | Enter a sequence number for the template page. This controls the order in which the tabs or tab sections appear on the Job Opening page. |
| Add Pages | This link appears at the bottom of the Job Opening Template page, after all existing page definitions. Click to add another template page at the bottom of the Template Structure page. (There is no scroll area for the template pages; they appear in one long list.) |

Job Opening Page Content

Use this grid to list the sections to be included in the template page.

| | |
|---------------------|--|
| Section | <p>Select the section or sections that you want included on this page. Values in the drop-down list box include both predefined recruiting sections and profile content types that have been configured for recruiting use.</p> <hr/> <p>Note. The Job Information section is always the first section on the first template page, where it appears in a read-only grid row</p> <hr/> |
| Add Sections | Click to add another section to the template page. A blank row appears in the Job Opening Page Content grid. |

Setting Up Job Opening Posting Templates

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

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

Understanding Job Opening Posting Templates

Job opening posting templates control which sections, or *posting description types* are available to include in a job posting.

Posting description types are categories of information that you can assemble when constructing a job posting. For example, your organization might have posting description types such as Qualifications, Responsibilities, and How to Apply.

When you define a job opening posting template, you select from the posting description types that you set up on the Posting Description Type page.

See Also

[Chapter 6, "Setting Up Additional Recruiting Definitions," Defining Posting Description Types, page 95](#)

Prerequisites

Before you can set up a job posting template, define posting description types.

See [Chapter 6, "Setting Up Additional Recruiting Definitions," Setting Up the Job Posting Description Library, page 94.](#)

Page Used to Set Up Job Opening Posting Templates

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|------------------|------------------------|---|--|
| Posting Template | HRS_JO_PST_TMPL | Set Up HRMS, Product Related, Recruiting, Templates, Job Opening Posting Template, Posting Template | Create a job opening posting template. |

Creating a Job Opening Posting Template

Access the Posting Template page (Set Up HRMS, Product Related, Recruiting, Templates, Job Opening Posting Template, Job Opening Posting Template).

Posting Template

Template Details

Job Opening Posting ID: 1000

Status:

Status Date:

***Description:**

Short Description:

Requisition Pages to Include

| Selected | Description | Seq Nbr |
|-------------------------------------|--------------------------------|--------------------------------|
| <input type="checkbox"/> | Basis of Rating | <input type="text"/> |
| <input type="checkbox"/> | Closing Statement | <input type="text"/> |
| <input type="checkbox"/> | Conditions of Employment | <input type="text"/> |
| <input checked="" type="checkbox"/> | Department Marketing Statement | <input type="text" value="1"/> |
| <input type="checkbox"/> | Equal Employment Opportunity | <input type="text"/> |
| <input type="checkbox"/> | How CTAP &/or ICTAP May Apply | <input type="text"/> |
| <input checked="" type="checkbox"/> | How To Apply | <input type="text" value="5"/> |
| <input type="checkbox"/> | How to Claim Vet Preference | <input type="text"/> |
| <input checked="" type="checkbox"/> | Org Marketing Statement | <input type="text" value="4"/> |
| <input type="checkbox"/> | Other Information | <input type="text"/> |
| <input type="checkbox"/> | Pay, Benefits & Work Schedule | <input type="text"/> |
| <input checked="" type="checkbox"/> | Qualifications | <input type="text" value="2"/> |
| <input checked="" type="checkbox"/> | Responsibilities | <input type="text" value="3"/> |
| <input type="checkbox"/> | Who May Apply | <input type="text"/> |

Posting Template page

Template Details

Job Opening Posting ID Template IDs are automatically assigned when you create the template.

Status and Status Date Indicate whether the definition is *Active* or *Inactive* and the date that the status was assigned. Only active templates are available for selection in recruitment templates. The system displays a warning if you attempt to inactivate a template that is used in a recruitment template.

Description Enter an identifying name for this template. A descriptive name helps you when you reference the template from within a recruitment template.

Requisition Pages to Include

This grid lists all active posting description types.

| | |
|----------------------------------|--|
| Selected | Select this check box for each posting description type that you want to include in the job posting. |
| Seq Nbr (sequence number) | Enter the order in which you want the posting description type to appear in the job posting. |

Setting Up Screening Templates

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

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

Understanding Screening Templates

Use screening templates to define default screening options that the system applies to job openings that are associated with the template. The default settings include a list of screening levels, the order in which the screening levels are processed, and whether applicants must pass the previous level in order to be processed by the next screening level.

For U.S. Federal agencies, there are also default settings related to score augmentation, veterans preferences, tie breakers, and candidate ranking. The template does not, however, include transmutation settings, which are configured in individual job openings.

Note. Screening templates do *not* include specific screening criteria. The criteria is job-specific and therefore must be configured in the Job Opening component.

Prerequisite

Before you begin to set up screening templates, define the screening levels that you want to include in the template.

See [Chapter 5, "Setting Up Screening Processes," Setting Up Screening Level Definitions, page 72.](#)

Page Used To Set Up Screening Templates

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|--------------------|------------------------|---|------------------------------|
| Screening Template | HRS_SCREEN_TMPL | Set Up HRMS, Product Related, Recruiting, Templates, Screening Template, Screening Template | Create a screening template. |

Setting Up a Screening Template

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

Screening Template

Screening Definition

***Status:** Active ▼ **Screening Template ID:** 1001

***Description:** Federal Salaried Transmutation

Short Description: Fed Sal

Max Total Points: 0

Must Pass Previous Levels

Federal

Raw Augmented Score Limit: 0 **Raw Veterans Pref Score Limit:** 0

Tie Break Number: 0

Competitive

Rank Candidates of Category 1 Rank Candidates of Category 2

Rank Candidates of Category 3 Rank Candidates of Category 4

Veteran Preferred in Tie Break

Non-competitive

Rank Candidates of Category 1 Rank Candidates of Category 2

Rank Candidates of Category 3 Rank Candidates of Category 4

Veteran Preferred in Tie Break

Screening Levels

[Customize](#) | [Find](#) | | [First](#) ◀ 1-3 of 3 ▶ [Last](#)

| *Sequence number | Screening ID | Description | | |
|------------------|--|-------------|---|---|
| 1 | Basic Eligibility ▼ | | + | - |
| 2 | Minimum Qualifications ▼ | | + | - |
| 3 | Quality Ranking ▼ | | + | - |

Screening Template page (standard)

Note. The settings on this page are default settings that the system uses for job openings that are associated with this template. Everything that you configure here can be changed in the Job Opening component.

Screening Definition

Screening Template ID Template IDs are automatically assigned when you create the template.

Status Indicate whether the definition is *Active* or *Inactive*. Only active templates are available for selection in recruitment templates. The system displays a warning if you attempt to inactivate a template that is used in a recruitment template.

| | |
|---|--|
| Description | Enter an identifying name for this template. A descriptive name helps you when you reference the template from within a recruitment template. |
| Max Total Points (maximum total points) | Enter the maximum points that an applicant can accumulate across all screening levels. During the applicant ranking process in U.S. federal implementations, the Rank Applicants page shows applicants' final scores both as numbers and as a percentage of the value you enter here, which is typically <i>100</i> . |
| Must Pass Previous Levels | <p>Select this check box if the applicant must pass the previous screening level before being evaluated for the next screening level.</p> <p>This setting does not apply to:</p> <ul style="list-style-type: none"> • The first screening level, as indicated by the lowest sequence number. • Prescreening or online screening levels. <p>Prescreening is always the first screening level anyway. Online screening can be preceded by prescreening (although the best practice is to use only one or the other in a job opening), but because failing prescreening stops the online application process, applicants cannot even reach the online screening level without passing any preliminary prescreening.</p> |

(USF) Federal

| | |
|--|---|
| Raw Augmented Score Limit | Enter the total number of augmentation points that can be awarded. You can configure screening to award augmentation points for certain competencies or accomplishments that are not required for the position but may be given consideration in the selection process. |
| Raw Veterans Pref Score Limit (raw veterans preference score limit) | Enter the maximum number of points that can be added to an applicant's final screening score for veterans preference. The number that you enter overrides veterans preference score higher than the limit. |
| Tie Break Number | Enter a random number to use in the tie-breaking algorithm for ranking applicants. |

(USF) Competitive and Non-Competitive

The same fields appear in the Competitive and Non-Competitive group boxes so that you can separately configure ranking options for competitive and noncompetitive applicants.

Rank Candidates of Category 1, Rank Candidates of Category 2, Rank Candidates of Category 3, and Rank Candidates of Category 4

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

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

Select check boxes for each category of applicants that are to be included in the final applicant ranking that produces the Certificate of Eligibles.

See [Chapter 5, "Setting Up Screening Processes," Understanding Priority Placement Processing, page 81.](#)

Veteran Preferred in Tie Break

Select this check box if you want applicants with veteran status to win tiebreakers during the ranking process.

Screening Levels

Use this grid to add screening levels to the template.

Sequence number

Assign each screening level an order number. This, in turn, becomes the default order of the screening levels in the job opening.

Screening levels for prescreening and online screening always appear first (prescreening before online screening if both exist). You cannot change the order for these screening levels.

Screening ID

Select the screening level definitions that you want to include in the template

Setting Up Interview Evaluation Templates

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

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

Understanding Interview Evaluation Templates

Interview evaluation templates define three aspects of the form that interviewers use to enter interview evaluations:

- Evaluation categories.

These are the different aspects of an applicant that the interviewer evaluates. For example, the interviewer might evaluate the applicant's communication skills, technical skills, and work experience.

On the interview template, you review all available categories and select which ones to include in the evaluation form.

- Ratings.

Interviewers evaluate applicants using a rating scale that you configure especially for this purpose.

On the interview template, you review all available ratings and select which ones to make available in the evaluation form.

- Recommendations.

Interviewers make recommendations using statuses for the interview recruitment areas. On the interview template, you review these statuses and select which ones to make available as recommendation options. For each status, you also choose which associated reasons to make available.

See Also

[Chapter 14, "Interviewing Applicants," Completing Interview Evaluations, page 448](#)

Prerequisites

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

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

See [Chapter 6, "Setting Up Additional Recruiting Definitions," Setting Up Interview Definitions, page 101](#).

Pages Used to Set Up Interview Evaluation Templates

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|-------------------------------|------------------------|---|--|
| Interview Evaluation Template | HRS_INT_EVL_DFN | Set Up HRMS, Product Related, Recruiting, Templates, Interview Evaluation Template, Interview Evaluation Template | Create an interview evaluation template. |

| Page Name | Definition Name | Navigation | Usage |
|------------------------|--------------------|---|--|
| Recommendation Reasons | HRS_INTEVL_RSN_SEC | Click the Reasons link on the Interview Evaluation Template page. | Select reasons (for a specific interview status) to make available to interviewers when they complete an interview evaluation. |

Creating an Interview Evaluation Template

Access the Interview Evaluation Template page (Set Up HRMS, Product Related, Recruiting, Templates, Interview Evaluation Template, Interview Evaluation Template).

Interview Evaluation Template

Template ID: 1000
***Description:** **Short Description:**
***Status:** ▼ **Status Date:** 08/10/2004

| Evaluation Categories | Customize View All | First | 1-4 of 4 | Last |
|---|----------------------|-------|----------|------|
| Evaluation Category | | | | |
| <input type="text" value="Communication Skills"/> ▼ | + | | | - |
| <input type="text" value="Education/Training"/> ▼ | + | | | - |
| <input type="text" value="Work Experience"/> ▼ | + | | | - |
| <input type="text" value="Technical Skills"/> ▼ | + | | | - |

Interview Evaluation Template page (1 of 2)

| Recommendation | | | | |
|-------------------------------------|-------------|---------------------------|--------------------------|-------------------------------------|
| | | Customize | View All | First 1-5 of 5 Last |
| Use | Status Code | Description | | Reason Required |
| <input checked="" type="checkbox"/> | 005 | 005 Interview | Reasons | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | 020 | 020 Make Offer | Reasons | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | 100 | 100 Hold | Reasons | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | 110 | 110 Reject | Reasons | <input checked="" type="checkbox"/> |
| <input checked="" type="checkbox"/> | 120 | 120 Withdrawn | Reasons | <input type="checkbox"/> |

| Rating Scale | | |
|-------------------------------------|---------------|---------------------------|
| | | Customize |
| | | View All |
| | | First 1-3 of 3 Last |
| Use | Rating | Score |
| <input checked="" type="checkbox"/> | Excellent | 2 |
| <input checked="" type="checkbox"/> | Average | 1 |
| <input checked="" type="checkbox"/> | Not Qualified | 0 |

[Create New Rating](#)

Interview Evaluation Template page (2 of 2)

- Template ID** Template IDs are automatically assigned when you create the template.
- Description** Enter an identifying name for this template. A descriptive name helps you when you reference the template from within a recruitment template.
- Status** Indicate whether the definition is *Active* or *Inactive*.
- Only active templates are available for selection in recruitment templates. The system displays a warning if you attempt to inactivate a template that is used in a recruitment template.
- Evaluation Categories**
- Evaluation Category** Select an evaluation category that you want included in the interview evaluation. Evaluation categories are created on the Interview Evaluation Category page.
- Create New Category** Click to access the Interview Evaluation Category page in Add New mode so that you can add additional categories to the system.

Recommendation

- Use and Status Code** Select the Use check box for a status code to make that status available as a recommendation on the interview evaluation form.
- Status codes are defined on the Status Effects page. The system automatically lists the status values that are defined for the interview recruitment area.
- Reasons** Click to access the Recommendation Reasons page, where you can choose which status reasons to make available on the evaluation form that interviewers use. The page lists all reasons (if any) that exist for the associated interview status.
- Reasons Required** Select this check box if you require interviewers to select an interview reason when they select the interview status value on the evaluation form. If you select this check box, confirm that there are, in fact, reasons associated with the indicated status.
- Interview reasons are defined on the Statuses and Reasons page.

Rating Scale

- Use and Rating** Select the Use check box for a rating to make that rating available as on the interview evaluation form.
- Ratings are defined on the Interview Evaluation Rating page. The system automatically lists all existing ratings.
- Score** Displays the number of points that are associated with the rating.
- Create New Rating** Click to access the Interview Evaluation Ratings page in Add New mode so that you can add additional ratings to the system.

See Also

- [Chapter 4, "Setting Up Recruiting Statuses," Setting Up Recruiting Statuses, page 48](#)
- [Chapter 14, "Interviewing Applicants," Completing Interview Evaluations, page 448](#)

Selecting Available Status Reasons

Access the Recommendation Reasons page (click the Reasons link on the Interview Evaluation Template page).

Recommendation Reasons

Status Code: 110 Reject

| Reasons | | |
|-------------------------------------|---------------|-------------------------|
| Use | Status Reason | Description |
| <input checked="" type="checkbox"/> | 010 | Insufficient Experience |
| <input checked="" type="checkbox"/> | 020 | Insufficient Skills |

OK Cancel

Recommendation Reasons page

Use and Status Reason Select the Use check box for a status reason to make that reason available as a recommendation on the interview evaluation form.

Setting Up Recruitment Templates

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

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

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

Understanding Recruitment Templates

Recruitment templates link all the recruiting templates together. Newly created job openings are automatically linked to a recruitment template, and all templates that are assigned to that recruitment template are then used by that job opening.

Specific sections on the job opening template need to be coordinated with the sections on the resume template. When you save the recruitment template, the system checks for these sections in the job opening template and verifies that the corresponding sections are included in the resume template:

- If the job opening template includes the section *Education and Experience*, then the resume template must have the *Training, Work History*, and *Education History* sections.
- Profile content types that are included in the job opening template must also be included in the resume template.

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

Prerequisites

Before you define recruitment templates:

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

See [Chapter 21, "Managing Employee Referral Programs," page 653](#).

Pages Used to Set Up Recruitment Templates

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

Linking Templates to Recruitment Templates

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

Recruitment Template

Recruitment Template ID: 1000

Template Settings Find | View All First 1 of 1 Last

*Effective Date:

*Effective Status:

*Description:

Short Description:

Templates

Standard Requisition Continuous Job Opening

Resume Template ID: Default

Job Opening Template ID: Requisition Default

Job Opening Posting ID: Posting

Screening Template ID: Full Screening Commercial

Employee Referral Program:

Interview Evaluation Template: Default Interview

*Load Rqmts from Job Profile:

[Segmenting Values](#)

Recruitment Template page

Templates

- Standard Requisition** Select this check box to make the template available for use with job openings that are standard requisitions.
- Continuous Job Posting** Select this check box to make the template available for use with job openings that are continuous job postings.
- Resume Template ID** Select the resume template that you want to link to this recruitment template.
- Job Opening Template ID** Select the job opening template that you want to link to this recruitment template.
- Job Opening Posting ID** Select the job opening posting template that you want to link to this recruitment template.
- Screening Template ID** Select the screening template that you want to link to this recruitment template.

Employee Referral Program Select the employee referral program that you want to link to this recruitment template. Define employee referral programs in the Employee Referral Program (HRS_REF_PGM) component.
See [Chapter 21, "Managing Employee Referral Programs," page 653](#).

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

Load Rqmts from Job Profile (load requirements from job profile) Select a source from which the system pulls profile content into a new job opening. The options are:

- *Not Used*
- *Job Code*
- *Job Family*
- *Position*
- *Salary Grade*

If you select an option other than *Not Used*, the system looks for a job profile that is associated with the indicated object. For example, if you select *Job Code*, then when a user creates a new job opening, the system looks for a job profile that is associated with the job code entered on the Primary Job Opening Information page. If one is found, the content items from that profile are imported into the new Job Opening.

Note. If you use full profile integration, Oracle recommends that you choose *Not Used* for this field. Full profile integration enables you to pull information from up to three explicitly identified profiles into job openings, and if the system attempts to pull in additional profile data based on the setting in this field, there can be errors if the total number of profiles from both sources exceeds three. Additionally, the automatic use of profiles in addition to the ones that the user explicitly identifies could be confusing to users.

Segmenting Values Click to display the Segmenting Values page, where you can identify specific subsets of your job openings that use this template.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles, "Getting Started with Manage Profiles"

Assigning Segmentation Values to Recruitment Templates

Access the Segmentation Values page (click the Segmenting Values link on the Recruitment Template page).

Recruitment Template

Segmentation Values

Recruitment Template ID: Recruitment Template 100

Effective Date: 07/05/2001

| Segmentation Values | | Customize Find First ◀ 1-2 of 2 ▶ Last |
|---------------------|------------------------|---|
| Job Family | Description | |
| KADMIN | Administrative Support | |
| KCLERK | Clerical | |

[Add Job Family](#)

Segmentation Values page

Segmentation Values

<Segmentation Value> The contents of this grid, and therefore the label for the first column, depend on the how you've chosen to segment your templates (a choice you make in the Template Segmenting Type field on the Recruiting Installation - General page).

List the segmentation values that use this recruitment template. For example, if you segment templates by job family, then list the job families that use this recruitment template. If you segment templates by department, use the grid to list the departments that use this template.

When a user creates a job opening, the primary job data includes a field for the segmenting value. If the system finds a recruitment template with a segmentation value that matches the job opening, it applies that recruitment template to the job opening. For example, if the job opening is for the KADMIN job family, then a recruitment template that lists the KADMIN job family in the Segmentation Values grid is applied. If there are no such recruitment templates, the system applies the default recruitment template indicated on the Recruiting Installation - General page.

See [Chapter 2, "Defining Installation Options for Recruiting," Defining General Settings for Templates, Approvals, and Integrations, page 11.](#)

See [Chapter 10, "Creating Job Openings," page 205.](#)

Chapter 8

Setting Up Recruitment Sources and Third Party Integrations

This chapter provides an overview of third party integrations and discusses how to:

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

See Also

[Chapter 18, "Managing Job Postings," Posting Jobs to PeopleSoft Services Procurement, page 552](#)

Understanding Third Party Integrations

This section provides overviews of:

- The open integration framework.
- Job board setup.
- Resume extractor setup.
- Background screener setup.

The Open Integration Framework

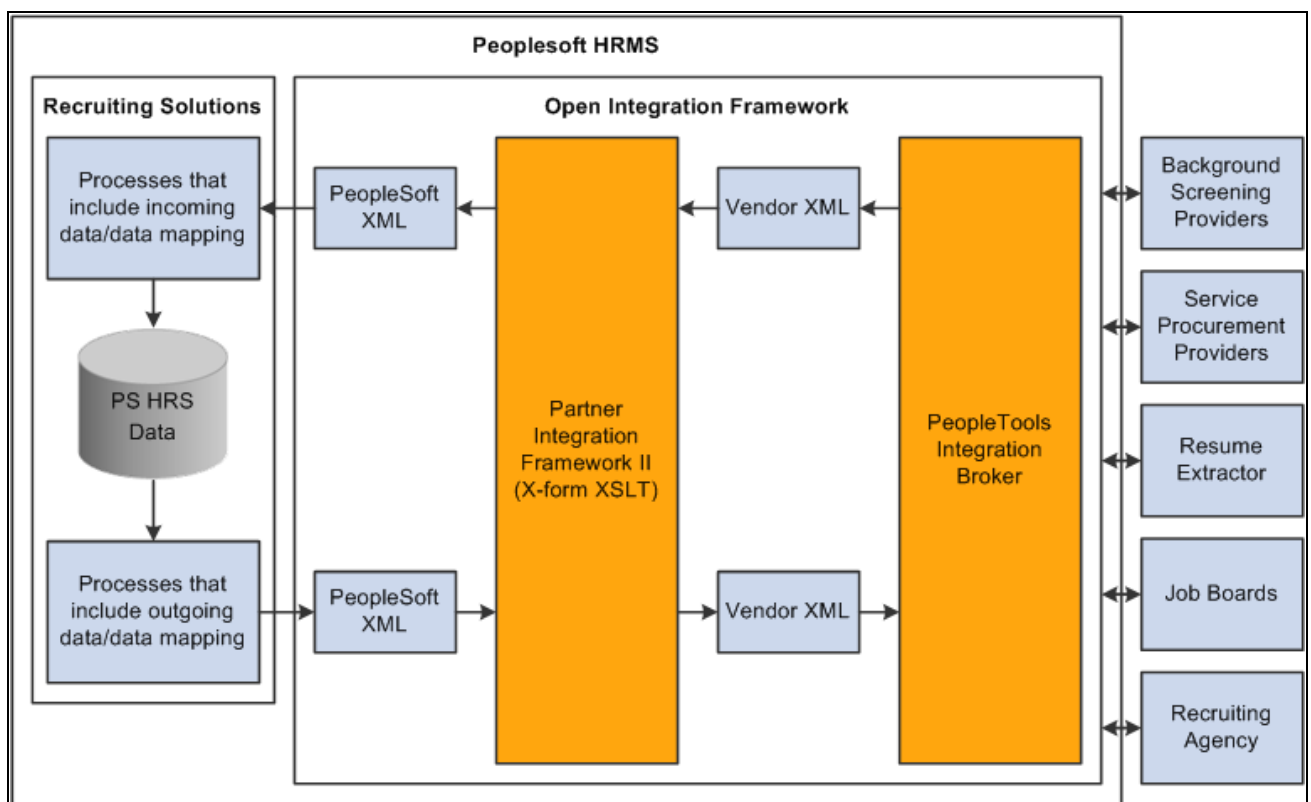
Sharing job opening and candidate information is essential to the success of the recruitment process. PeopleSoft provides an open integration framework that enables you to integrate with:

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

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

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

This diagram illustrates how the Open Integration Framework manages the exchange of information between PeopleSoft Recruiting Solutions and external service providers:



The Open Integration Framework manages integration between PeopleSoft Recruiting Solutions and external systems

Job Board Setup

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

1. Set up the job board vendor in the Vendor Setup component.
2. Set up a recruitment source in the Recruitment Sources component, and associate it with the vendor.

- (Optional) Set up data mapping to support the recruitment source.

Integration With PeopleSoft Service Procurement

Oracle delivers prebuilt integration points between Talent Acquisition Manager and PeopleSoft Service Procurement. The *PeopleSoft Enterprise Service Procurement PeopleBook* provides detailed information about this integration and how to set it up. The integration requires those recruiting users who post jobs to Services Procurement to also be users of the Services Procurement system, with identical user IDs and passwords in both systems.

See [Chapter 18, "Managing Job Postings," Posting Jobs to PeopleSoft Services Procurement, page 552.](#)

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:

- Set up the resume extractor.
 - Follow the vendor-provided instructions.
- 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 | <i>Apply Online</i> | <i>Email</i> | <i>Open Integration Framework</i> | <i>Resume Load Process</i> |
|-------------|---|---|---|---|
| 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 |

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

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

Background Screener Setup

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

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

Setting Up Recruiting Vendors

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

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

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

Understanding How to Set Up Recruiting Vendors

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

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

See *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.

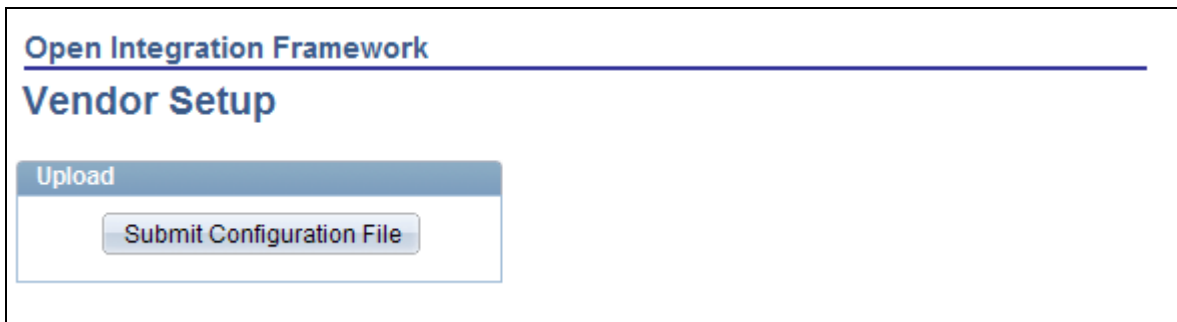
Although data mapping is optional, it makes integration much more effective.

Pages Used to Set Up Recruiting Vendors

| Page Name | Definition Name | Navigation | Usage |
|-----------------------------|------------------------|---|---|
| Vendor Setup | HRS_VENDOR_FILE | Set Up HRMS, Product Related, Recruiting, Integration, Vendor, Vendor Setup | Load a new vendor configuration file, or view and modify details after loading a vendor configuration file. |
| Pre-Employment Vendor Setup | HRS_PREEMPL_VNDR | Click the Extended Setup link on the Vendor Setup page. | Define settings for pre-employment vendors. |
| Integration Test | HRS_VENDOR_TEST | Click the Test link for a transaction on the Vendor Setup page. | Test vendor integration. |

Loading a Vendor Configuration File

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



Vendor Setup page in Add a New Value mode

Submit Configuration File

Click to display a File Attachment dialog box, where you identify and upload the vendor's configuration file. After the system uploads the file, this button is hidden and the page instead displays page elements that you use to review and configure the vendor data.

Configuring Vendors

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

When you access an existing vendor, or after you upload the configuration file for a vendor that you are adding, the page displays vendor setup fields.

Open Integration Framework

Vendor Setup

Transaction Group: PreEmployment Version: 1

Vendor Setup

*Long Name: *Status:

*Short Name:

Description:

Filename: [Submit File](#)

Allow Node Updates on Upload

[Vendor Administration](#)

[Extended Setup](#)

| Transaction | *Log Style | Node | Test |
|----------------------|--------------------------------------|-------------------------|----------------------|
| PreEmploymentCheck | <input type="text" value="Log All"/> | HROI 8 | Test |
| PreEmploymentStatus | <input type="text" value="Log All"/> | HROI 9 | Test |
| PreEmploymentExpense | <input type="text" value="Log All"/> | HROI 10 | Test |
| PreEmploymentView | <input type="text" value="Log All"/> | HROI 11 | Test |
| VendorAdministration | <input type="text" value="Log All"/> | HROI 12 | Test |

Transaction:

Vendor Setup page after loading vendor configuration file

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

Vendor Setup

Status Indicate whether the vendor is *Active* or *Inactive*.

| | |
|-------------------------------------|---|
| Allow Node Updates on Upload | The node definitions are set up by the process of loading the vendor configuration file. If subsequent loads of the file are necessary (perhaps a customer gets an updated configuration file from the vendor), the Allow Node Updates on Upload check box enables the user to update the node definition or keep allowing the nodes to be updated. |
| Vendor Administration | Click to access the vendor's administration page. Not all vendors will support this option. |
| Extended Setup | Click to access the Pre-Employment Vendor Setup page, where you can define settings for pre-employment vendors. This link appears only for vendors in the PreEmployment transaction group, based on the setup in the Extension Configuration group box on the Open Integration Framework - Transaction Group Setup page. |
| Transactions | |
| Log Style | <p>Defines when to log messages on the Integration Log page. Values are:</p> <p><i>Log All:</i> An entry is entered into the integration log every time a message is received from the vendor.</p> <p><i>Never Log:</i> An entry is never made to the integration log.</p> <p><i>On Error:</i> An entry is made to the integration log only when an error occurs.</p> |
| Node | Displays the node name that is associated with the vendor's transaction. These node names are dynamically created. Click a node link to access the Connectors page in PeopleTools Integration Broker. |
| Test | Click to access the Integration Test page, where you can test the integration setup for outgoing messages. The Test links do not apply to incoming transactions. |

Defining Settings for Pre-Employment Vendors

Access the Pre-Employment Vendor Setup page click the Extended Setup link on the Vendor Setup page).

Open Integration Framework

Pre-Employment Vendor Setup

Preemployment Vendor

Name: HireRight, Inc

Status: Active

Options

Display Adjudication View Results on External Site

Pre-Employment Vendor Setup page

Display Adjudication Select this check box to make the adjudication status visible to managers, recruiters, and recruiting administrators on the Manage Applicants - Pre-employment Check and Pre-employment Check - Pre-employment Check Details pages. If you deselect this check box, the system displays *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.

Testing Vendor Integration

Access the Integration Test page (click the Test link for a transaction on the Vendor Setup page).

Integration Test

| Label | Value |
|-----------|----------------------|
| Person ID | <input type="text"/> |

Integration Test page

Integration Test This grid lists the fields that require data in order for the test to be performed. Enter values for each field.

Run Test

Click to test the integration. The system displays the Integration Log page, where you can review the results of the test.

Setting Up Data Mapping

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

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

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

Understanding Data Mapping

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

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

Assignments and Categories

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

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

- Competencies.
- Honors and Awards.
- Language (accomplishment).
- Licenses and Certifications.
- Memberships.
- Degrees.
- Major.
- School.
- Country.
- State/Providence.
- Language (translate values).

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

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

Postal

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

Data Mapping Setup Steps

To set up data mapping:

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

Pages Used to Set Up Data Mapping

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

Creating Data Mapping Assignments

Access the Assigned Mapping Setup page (Set Up HRMS, Product Related, Recruiting, Integration, Data Mapping Assignments, Assigned Mapping Setup).

| Datamapping Setup | | | |
|------------------------|--|--|----------------------------------|
| Assigned Mapping Setup | | | |
| Assigned Map | | Customize Find  First 1-2 of 2 Last | |
| Select | Description | | |
| All | <input type="text" value="ALL"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |
| HireRight, Inc | <input type="text" value="HireRight"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |

Assigned Mapping Setup page

Assigned Map

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

Setting Up Categories

Access the Category Setup page (Set Up HRMS, Product Related, Recruiting, Utilities, Data Mapping Categories, Category Setup).

Category Setup page

AppClass (application class)

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

Run Sync Now (run synchronization now)

Click to synchronize the data that is associated with the selected data mapping category with the data actually existing in the corresponding component. This process populates the Key List and Value List pages.

Viewing Key Lists

Access the Key List page (Set Up HRMS, Product Related, Recruiting, Utilities, Data Mapping Categories, Key List).

| Category Setup | | | Key List | Value List |
|-----------------|--------------------|-----------------|-----------|--------------|
| Key List | | | | |
| Category: State | | | | |
| Keys | | | Customize | Find |
| | | | View 100 | 1-15 of 1639 |
| SubCategory▲ | Keys▼ | Description▲ | | |
| ARG | BA | Buenos Aires | | |
| ARG | CF | Capital Federal | | |
| ARG | CT | Catamarca | | |
| ARG | CH | Chaco | | |
| ARG | CB | Chubut | | |
| ARG | CO | Cordoba | | |
| ARG | CR | Corrientes | | |
| ARG | ER | Entre Rios | | |
| ARG | FO | Formosa | | |
| ARG | JU | Jujuy | | |
| ARG | LP | La Pampa | | |
| ARG | LR | La Rioja | | |
| ARG | MZ | Mendoza | | |
| ARG | MI | Misiones | | |
| ARG | NQ | Neuquen | | |

Key List page

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

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

Viewing Value Lists

Access the Value List page (Set Up HRMS, Product Related, Recruiting, Utilities, Data Mapping Categories, Value List).

| Value List | | |
|-----------------|------------------------|-----------|
| Category: State | | |
| SubCategory▲ | Keys▲ | Language▲ |
| ARG | ARG_BA | English |
| ARG | ARG_CB | English |
| ARG | ARG_CF | English |
| ARG | ARG_CH | English |
| ARG | ARG_CO | English |
| ARG | ARG_CR | English |
| ARG | ARG_CT | English |
| ARG | ARG_ER | English |
| ARG | ARG_FO | English |
| ARG | ARG_JU | English |
| ARG | ARG_LP | English |
| ARG | ARG_LR | English |
| ARG | ARG_MI | English |
| ARG | ARG_MZ | English |
| ARG | ARG_NQ | English |

Value List page

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

Mapping Unmapped Data

Access the Unmapped Data page (Set Up HRMS, Product Related, Recruiting, Integration, Data Mapping, Unmapped Data).

The screenshot shows the 'Unmapped Data' page with three tabs: 'Unmapped Data', 'Key Data Mapping', and 'Value Data Mapping'. The 'Unmapped Data' tab is active. Below the tabs is a search section with the following fields:

- Value:** A text input field.
- Assigned Map:** A dropdown menu.
- Category:** A dropdown menu with 'School' selected.
- Language:** A dropdown menu.
- Search:** A button.

Unmapped Data page (1 of 2)

The screenshot shows the 'Unmapped Required Values' section of the 'Unmapped Data' page. It includes a 'Minimum Score' input field and a 'Make Suggestions' button. Below this is a table with the following columns: Category, Value, Language, *Key ID, Description, *Assigned Map, and *Use. The table contains five rows of data.

| Category | Value | Language | *Key ID | Description | *Assigned Map | *Use |
|----------|--------------------------|----------|---------|---------------------------------|---------------|----------|
| School | St. Mary's College | English | KPC32 | St. Xavier's College | ALL | Unmapped |
| School | University of California | English | KNS002 | University of Amsterdam | ALL | Unmapped |
| School | College of San Mateo | English | KPI35 | Symbiosis Institute of Business | ALL | Unmapped |
| School | University of Florida | English | F00010 | Florida State | ALL | Unmapped |
| School | College of Palo Alto | English | KPU02 | Anna University | ALL | Unmapped |

Unmapped Data page (2 of 2)

Minimum Score Identifies a threshold for the Make Suggestions search. Only results that 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 (Set Up HRMS, Product Related, Recruiting, Integration, Data Mapping, Key Data Mapping).

Key Data Mapping page (1 of 2)

| Value | Assigned Map | Language Code | *Use | Go |
|-----------------|--------------|---------------|------|--------------------|
| KPU13 | ALL | English | In C | Go |
| Agra University | ALL | English | Bot | Go |
| IND_KPU13 | ALL | English | In C | Go |

Key Data Mapping page (2 of 2)

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

Values

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

Value Select the values that are associated with the key.

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

Mapping Values

Access the Value Data Mapping page (Set Up HRMS, Product Related, Recruiting, Integration, Data Mapping, Value Data Mapping).

The screenshot shows a web interface with three tabs: 'Unmapped Data', 'Key Data Mapping', and 'Value Data Mapping'. The 'Value Data Mapping' tab is active. Below the tabs is a search section with a dropdown arrow and the text 'Search'. The search section contains five input fields: 'Key:' (empty), 'Value:' (empty), 'Assigned Map:' (empty dropdown), 'Category:' (dropdown with 'School' selected), and 'Language:' (empty dropdown). A 'Search' button is located at the bottom left of the search section.

Value Data Mapping page (1 of 2)

The screenshot shows a web interface for 'Value Results'. At the top, there are navigation links: 'Find | View All | First | 1 of 1 | Last'. Below this, the search results are displayed as follows:

- Value:** New York University
- Category:** School
- SubCategory:**
- Language:** English

Below the search results is a table titled 'Keys' with the following columns: 'Key', 'Assigned Mapping ID', '*Use', and 'Go'. The table contains one row of data:

| Key | Assigned Mapping ID | *Use | Go |
|--------|---------------------|------|----|
| F00012 | ALL | Both | Go |

At the bottom of the 'Keys' section, there is an 'Insert' button.

Value Data Mapping page (2 of 2)

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

Keys

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

Key Select the key ID of the data mapping.

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

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

Mapping Inbound Postal Information

Access the Inbound Map page (Set Up HRMS, Product Related, Recruiting, Integration, Postal Map, Inbound Map).

Inbound Map
Outbound Map

Country: ANT Netherlands Antilles

Inbound Postal Mapping
Customize | Find | First 1-9 of 9 Last

| Field Name | Edit Label Override | Include in Display? | Line Number | Position Number | HR XML Postal |
|------------|--------------------------|-------------------------------------|-------------|-----------------|----------------------|
| ADDRESS1 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 1 | 1 | <input type="text"/> |
| ADDRESS2 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 2 | 1 | <input type="text"/> |
| ADDRESS3 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 3 | 1 | <input type="text"/> |
| ADDRESS4 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 4 | 1 | <input type="text"/> |
| CITY | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 5 | 1 | <input type="text"/> |
| COUNTRY | <input type="checkbox"/> | <input type="checkbox"/> | | | <input type="text"/> |
| COUNTY | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 6 | 1 | <input type="text"/> |
| POSTAL | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 5 | 3 | <input type="text"/> |
| STATE | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 5 | 2 | <input type="text"/> |

Map Default

Inbound Map page

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

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

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

Mapping Outbound Postal Information

Access the Outbound Map page (Set Up HRMS, Product Related, Recruiting, Integration, Postal Map, Outbound Map).

| Inbound Map | | Outbound Map | | | | |
|--|---------------------|-------------------------------------|-------------|---|----------------|----------------------|
| Country: ANT Netherlands Antilles | | | | | | |
| Outbound Postal Mappings | | | | Customize Find First 1-9 of 9 Last | | |
| Field Name | Edit Label Override | Include in Display? | Line Number | Position Number | HR XML Postal | Sequence |
| ADDRESS1 | | <input checked="" type="checkbox"/> | 1 | 1 | AddressLine[1] | <input type="text"/> |
| ADDRESS2 | | <input checked="" type="checkbox"/> | 2 | 1 | AddressLine[2] | <input type="text"/> |
| ADDRESS3 | | <input checked="" type="checkbox"/> | 3 | 1 | AddressLine[3] | <input type="text"/> |
| ADDRESS4 | | <input checked="" type="checkbox"/> | 4 | 1 | AddressLine[4] | <input type="text"/> |
| CITY | | <input checked="" type="checkbox"/> | 5 | 1 | Municipality | <input type="text"/> |
| COUNTRY | | <input type="checkbox"/> | | | CountryCode | <input type="text"/> |
| COUNTY | | <input checked="" type="checkbox"/> | 6 | 1 | | <input type="text"/> |
| POSTAL | | <input checked="" type="checkbox"/> | 5 | 3 | Postal Code | <input type="text"/> |
| STATE | | <input checked="" type="checkbox"/> | 5 | 2 | Region[1] | <input type="text"/> |
| <input type="button" value="Map Default"/> | | | | | | |

Outbound Map page

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

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

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

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

Setting Up Resume Email Accounts

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

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

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

Understanding Resume Email Accounts

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

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

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

Setting Up Resume Email Accounts

To receive incoming resumes by email:

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

See [Chapter 8, "Setting Up Recruitment Sources and Third Party Integrations," Setting Up Recruiting Vendors, page 158.](#)

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

See [Chapter 8, "Setting Up Recruitment Sources and Third Party Integrations," Setting Up Recruitment Sources, page 181.](#)

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_PRCES_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"*

Pages Used to Define Resume Email Accounts

| Page Name | Definition Name | Navigation | Usage |
|--------------------------------|------------------------|--|--|
| Email Setup | HRS_EMAIL_SETUP | Set Up HRMS, Product Related, Recruiting, Integration, Resume Email, Email Setup | Set up resume email accounts where organizations or individuals will send resumes. |
| Email List | HRS_EMAIL_LIST | Set Up HRMS, Product Related, Recruiting, Integration, Resume Email, Email List | View a list of emails that have been retrieved from the email account. |
| View Email Message/Attachments | HRS_EMAIL_VIEW | Click the subject link for an email that is listed on the Email List page. | View email attachments and select resumes. |

Setting Up Resume Email Accounts

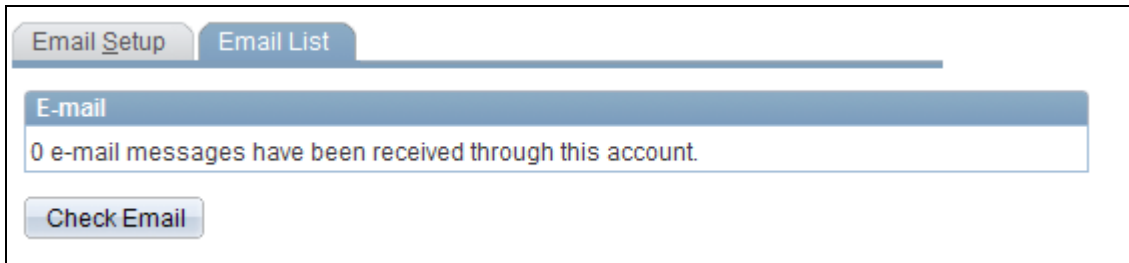
Access the Email Setup page (Set Up HRMS, Product Related, Recruiting, Integration, Resume Email, Email Setup).

Email Setup page

- Status** Select a status: *Active* or *Inactive*. If you select *Inactive*, the system does not run the Email Checking Process. However, the system does run the Process Awaiting Emails process for all resumes in the Awaiting Resolution state.
- Email, User, and Password** Enter the email address where you want to receive applicant emails, and the user ID and password for the email address.
- Server** Enter the email server where you set up the email address.
- Node** Select the node that you set up to receive emails. PeopleSoft delivers the following standard email node: MCF_GETMAIL.
- Path** Enter the path where the email node stores email attachments. By default, the value that you specify for the MCF_AttRoot property on the Connectors page appears here.
- Source** Select the recruitment source with which you want to associate the incoming emails. Only recruitment sources with a source type of Vendor appear in the prompt. This is not a required field; however, you should populate this field with a source to properly manage incoming resumes. Define recruitment sources by using the Source Setup (HRS_SOURCE_SETUP) component.
- Test Setting** Click to test the setup. In this process, the system obtains an email count. If the system can get a count, even if the count is zero, the setup is a success. A success or fail message appears depending on whether the setup is a success or failure.

Viewing Lists of Emails

Access the Email List page (Set Up HRMS, Product Related, Recruiting, Integration, Resume Email, Email List).



Email List page

Email

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

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

Email From Displays the email address of the sender.

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

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

Additional Page Element

Check Email Click to run the Email Checking Process.

Viewing Email Attachments and Selecting Resumes

Access the View Email Message/Attachments page (click the subject link for an email that is listed on the Email List page).

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

Message Displays the exact message text from the email message.

Attachments

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

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

Setting Up Recruitment Sources

To set up recruitment sources, use the Recruitment Contacts (HRS_CONTACT), AutoScreen Setup (HRS_AUTOSCREEN), and Source Setup (HRS_SOURCE_SETUP) components.

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

- Set up recruiting contacts.
- Set up autoscreening criteria for vendor recruitment sources
- Set up recruitment sources.
- Define settings for company recruitment sources.
- Define settings for marketing and company recruitment sources.
- Define settings for vendor recruitment sources.
- 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 are used as posting destinations include:

- Your company's job sites.
- Third-party job board vendors.
- Recruiting agencies.
- Services procurement providers.

Examples of recruitment sources that are used as applicant sources include:

- Internet advertisements.
- Newspapers.
- Magazines.
- Job fairs.

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 associate with the recruitment source. PeopleSoft delivers four source types:

| Source Type | Description |
|--------------------|--|
| Company | <p>Your company's own job sites.</p> <p>For company recruitment sources, the Company page appears; use this page to associate site definitions with the recruitment source.</p> <p>See Chapter 6, "Setting Up Additional Recruiting Definitions," Setting Up Sites, page 90.</p> |
| Employee | <p>Employee referrals.</p> <p>For employee recruitment sources, the Marketing page appears so that you can define which sites permit applicants to select the source in the referrals section of the online job application.</p> |
| Marketing | <p>Non-employee sources of applicant referrals.</p> <p>For marketing recruitment sources, the Marketing page appears so that you can define which sites permit applicants to select the source in the referrals section of the online job application. Additionally, marketing sources (unlike employee sources) enable you to define subsources. For example, if you have a source for magazines, you could list specific publications as subsources.</p> |
| Vendor | <p>Third-party vendors with whom you integrate using the open integration framework.</p> <p>For vendor recruitment sources, the Vendor page appears so that you can define various integration options, including the vendor definition, resume extraction settings, and notifications.</p> <p>See Chapter 8, "Setting Up Recruitment Sources and Third Party Integrations," Setting Up Recruiting Vendors, page 158.</p> |

Prerequisites

Before you set up recruitment sources, set up your sites.

See [Chapter 6, "Setting Up Additional Recruiting Definitions," Setting Up Sites, page 90.](#)

Additionally, before you set up vendor recruitment sources, you must set up vendors.

See [Chapter 8, "Setting Up Recruitment Sources and Third Party Integrations," Setting Up Recruiting Vendors, page 158.](#)

Pages Used to Set Up Recruitment Sources

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|------------------|------------------------|--|---|
| Contact Setup | HRS_CONTACT | Set Up HRMS, Recruiting, Recruitment Sources, Recruitment Contacts, Contact Setup | Define recruiting contacts. You reference recruiting contacts from recruiting source definitions. |
| AutoScreen Setup | HRS_AUTOSCREEN | Set Up HRMS, Product Related, Recruiting, Recruitment Sources, AutoScreen, AutoScreen Setup | Identify an application class to automatically screen incoming resumes. You reference autoscreening definitions from recruiting source definitions for vendors. |
| 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. |

Setting Up Recruiting Contacts

Access the Contacts - Contact Setup page (Set Up HRMS, Recruiting, Recruitment Sources, Recruitment Contacts, Contact Setup).

Contacts

Contact Setup

Contact

Code: *Contact Type:

Description:

Short Description:

Name:

Address

Country:

Address 1:

Address 2:

Address 3:

City:

State:

Postal:

County:

Contact Setup page (1 of 2)

Telephone

Phone Details

| Phone Type | Country Code | Telephone | | |
|-----------------------------------|----------------------|---|----------------------------------|----------------------------------|
| <input type="text" value="Main"/> | <input type="text"/> | <input type="text" value="408/235-8395"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |

Email Address

Email Addresses:

Contact Setup page (2 of 2)

Contact

Contact Type

Select the type of contact. Values are:

- *General*: This option is reserved for future use.
- *Office*: Used in the Recruiting Office field when you are creating a job opening to identify the recruitment contact.
- *Source*: Defines the details for proxy information.

Address

Enter the address for this contact.

Telephone

Enter the telephone numbers for this contact.

Email Addresses

Enter the email addresses for this contact.

Setting Up Autoscreening Criteria for Vendor Recruitment Sources

Access the AutoScreen Setup page (Set Up HRMS, Product Related, Recruiting, Recruitment Sources, AutoScreen, AutoScreen Setup).

AutoScreen Setup

AutoScreen Setup

*Name:

*Status:

*Description:

Application Classes Customize | Find | First 1 of 1 Last

| Application Class Name |
|------------------------|
| Verify Email |

AutoScreen Setup page

Setting Up Recruitment Sources

Access the Source Setup page (Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Recruitment Sources, Source Setup).

Source Setup Find | View All First 1 of 1 Last

Source Name: Source Type:

*Effective Date: *Status:

*Description:

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 <i>Active</i> or <i>Inactive</i> . Inactive sources do not appear in system prompts. |
| Description | Enter a description. This field is used only for informational purposes. |
| Source Type | Select a source type: <i>Company</i> , <i>Employee</i> , <i>Marketing</i> , or <i>Vendor</i> . The source type that you select here controls the pages that appear in this component. When you select a source type, the Company, Marketing, or Vendor page appears, depending on the source type that you select. |

Defining Settings for Company Recruitment Sources

Access the Company page (Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Recruitment Sources, Company).

Note. This page appears only for recruitment sources with the source type *Company*.

The screenshot displays the 'Company' page within the 'Source Setup' section. At the top, there are three tabs: 'Source Setup', 'Company', and 'Contacts'. The 'Source Setup' tab is active, showing the following details:

- Source Name:** Internet
- Effective Date:** 01/01/1900

Below the source details is a 'Sites' table. The table has a header row with 'Site' and a toolbar with 'Customize', 'Find', 'First', '1 of 1', and 'Last'. The table contains one row with the site name 'Default Site' in a dropdown menu, and '+' and '-' buttons to the right.

Company page

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

Defining Settings for Marketing and Employee Recruitment Sources

Access the Marketing page (Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Recruitment Sources, Marketing).

Note. This page appears only for recruitment sources with the source type *Marketing* or *Employee*.

The screenshot displays the 'Marketing' page for a recruitment source named 'Magazines'. The 'Effective Date' is set to 01/01/1900. The page is divided into two main sections: 'Access by Site Id' and 'Subsources'.

Access by Site Id Table:

| Site | + | - |
|-------------------------------|---|---|
| GBI Corporate - Internal Site | + | - |
| GBI Corporate - External Site | + | - |
| GBI Media - Internal Site | + | - |
| GBI Media - External Site | + | - |

Subsources Table:

| Subsource Description | *Status | + |
|-------------------------|---------|---|
| The New Yorker | Active | + |
| The Economist | Active | + |
| The Wall Street Journal | Active | + |
| Other | Active | + |

Marketing page

Access by Site ID

Use this grid to specify which Candidate Gateway sites list this recruitment source as a valid referral source. For example, if you are defining a recruitment source for your internal employee newsletter, you would associate that source with the internal sites used by the employees who receive that newsletter.

Once a source is associated with a site, applicants who apply for jobs on that site can select that source in the How did you find out about us? field in the online application form (if the resume template includes the Referrals section).

Subsources

If the source type is *Marketing*, you can use this grid to define subsources. When a user selects a source on the online application pages in Candidate Gateway (or on the Load Resume - Prepare Load Parameters page), the user also can select a subsource from a list of values that you define here. Only active subsources appear as valid options. You cannot edit or delete the subsource description that you enter after you save the source.

Note. Although the Marketing page appears when the source type is either *Marketing* or *Employee*, the subsources grid is appears only for the *Marketing* source type, not for the *Employee* source type.





Defining Settings for Vendor Recruitment Sources


Access the Vendor page (Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Recruitment Sources, Vendor).

Note. This page appears only for recruitment sources with the source type *Vendor*.

The screenshot displays the 'Vendor' configuration page for a recruitment source. At the top, there are tabs for 'Source Setup', 'Vendor', and 'Contacts'. The 'Source Setup' section shows 'Source Name: Executive Recruiters' and 'Effective Date: 01/01/1900'. Below this is the 'Vendor' section with a dropdown for 'Vendor', a dropdown for 'Site ID' (currently showing 'GBI Corporate - External Site'), and a text field for 'Info URL'. The 'Screening' section contains several fields: 'Unresolved:' (text field with search icon), 'Reject:' (text field with search icon, containing 'Email Verification'), 'Draft:' (text field with search icon, containing 'Default Status - Always Fail'), and '*On Extraction Failure:' (dropdown menu set to 'Reject'). At the bottom of the screening section, there are two checked checkboxes: 'Retain Position Association' and 'Notify On Screening'.

Vendor page (1 of 2)

| Notifications | |
|---------------|---|
| Unresolved: | <input type="text"/>  |
| Rejected: | <input type="text"/>  |
| Draft: | <input type="text"/>  |
| Success: | <input type="text"/>  |

| Extractor | |
|--------------------|---|
| Default Extractor: | <input type="text"/>  |
| Language: | English  |
| Country: | United States  |

Vendor page (2 of 2)

Vendor

Vendor

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

Site ID

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

Info URL (information uniform resource locator)

Enter the URL that determines where users can go to view the job postings for this source.

Screening

Unresolved, Reject, and Draft

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

1. Reject
2. Unresolved
3. Draft

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

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

On Extraction Failure

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

Retain Position Association

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

Notify On Screening

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

Notifications

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

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

These are the default values:

| Field | Notification |
|--------------|---------------------|
| Unresolved | HRS_HROI_UNRESOLVED |
| Rejected | HRS_HROI_REJECTED |

| Field | Notification |
|--------------|---------------------|
| Draft | HRS_HROI_DRAFT |
| Success | HRS_HROI_SUCCESS |

Extractor

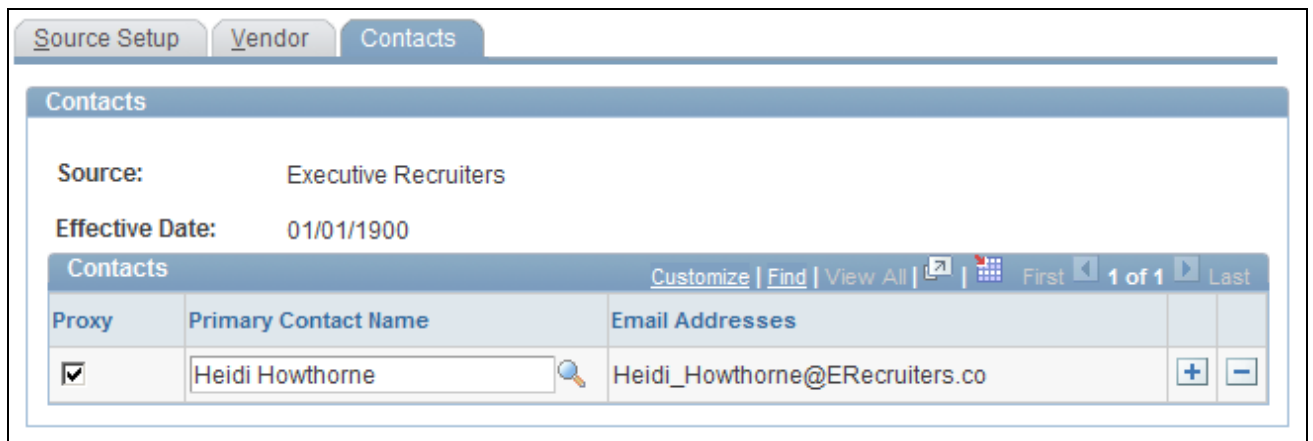
Default Extractor Select the default resume extractor that the system uses for non-XML resumes that come from this source. However, note that you can process resumes through another extractor by using the Manage Resumes (HRS_AL_LOG) component.

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

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

Defining Contacts for a Recruitment Source

Access the Contacts page (Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Recruitment Sources, Contacts).



Contacts page

Proxy

Select to have the system create a proxy for incoming applicants from this source. This proxy functionality applies only to Vendor source types.

When a staffing supplier submits a resume, it is common not to contact the applicant to whom the resume belongs. Instead, all communication with the applicant, up until the interview with the applicant, is done through the staffing supplier. The person at the staffing supplier organization who handles this duty is referred to as a proxy. The proxy takes on all responsibilities of the applicant and is both responsible and expected to act in the best interest of the applicant. On system pages that show applicant contact information, the contact information for the proxy is also included. When you send correspondence to an applicant who uses a proxy, the system sends the correspondence to the proxy, not the applicant.

Primary Contact Name and Email Addresses

Select a contact. You can select from any contact that has a contact type of general. When you select a contact, the system populates the Email Addresses field with the email address of the contact. Define contacts on the Contacts - Contacts Setup page.

Reviewing the Integration Transaction Log

This section discusses how to review the integration transaction log.

Pages Used to Review the Integration Transaction Log

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|---|------------------------|---|--|
| Integration Log | HRS_HROL_LOG | Set Up HRMS, Product Related, Recruiting, Integration, Integration Log, Integration Log | Review the integration transaction log. |
| Integration Log Outgoing Msg (integration log outgoing message) | HRS_HROL_LOG_O_XML | Click a transaction link on the Integration Log page. | Review detailed information about outgoing messages. |

Reviewing the Integration Transaction Log

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

Open Integration Framework



Integration Log


▼ Search Integration Log

Status:

Vendor:

Transaction ID:

Last Updated From:  To: 

Search Results Customize | Find | View All |  First 1 of 1 Last

| Transaction | Transaction Type | Vendor | Last Updated | Status |
|------------------------------------|------------------|-------------------|-------------------|--------------------|
| PreEmploymentCheck | OutSync | TestPreEmployment | 06/08/2009 3:19PM | Connection Failure |

Integration Log page

Search Results

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

Reviewing Outgoing Message Details

Access the Integration Log Outgoing Msg page (Click a transaction link on the Integration Log page).

Integration Log Outgoing Msg

[Open Integration Framework](#)

Outgoing Message Details

Request

```
<?xml version="1.0"?>
<SOAP-ENV:Envelope xmlns:SOAP-ENC="http://schemas.xmlsoap.org/soap/encoding/" xmlns:SOAP-
ENV="http://schemas.xmlsoap.org/soap/envelope/" xmlns:m="http://peoplesoft.com/HCM/Schema"
xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
  <SOAP-ENV:Body>
    <m:Input>
      <Values>
        <Value>
          <Name>Vendor Name</Name>
          <Value>%DBNAME</Value>
        </Value>
      </Values>
    </m:Input>
  </SOAP-ENV:Body>
</SOAP-ENV:Envelope>
```

Vendor Request

```
<?xml version="1.0"?>
<SOAP-ENV:Envelope xmlns:SOAP-ENC="http://schemas.xmlsoap.org/soap/encoding/" xmlns:SOAP-
ENV="http://schemas.xmlsoap.org/soap/envelope/" xmlns:m="http://peoplesoft.com/HCM/Schema"
xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
  <SOAP-ENV:Body>
    <m:Input>
      <Values>
        <Value>
          <Name>Vendor Name</Name>
          <Value>%DBNAME</Value>
        </Value>
      </Values>
    </m:Input>
  </SOAP-ENV:Body>
</SOAP-ENV:Envelope>
```

Integration Log Outgoing Msg page

This page includes the following fields that display detailed information about integration messages:

- Request
- Vendor Request
- Vendor Response
- Response
- Error

Chapter 9

Understanding Approval Delegation in Talent Acquisition Manager

This chapter provides overviews of:

- Talent Acquisition Manager delegations.
- The delegation framework.
- Delivered delegation definitions for recruiting.
- The delegation process

Talent Acquisition Manager Delegations

Talent Acquisition Manager uses delegation to authorize one person to serve as another person's representative when performing the following actions:

- Approving a job opening.
- Approving a Job offer.

There is no special approval processing when the process includes a proxy. The proxy simply replaces the delegator in the chain.

The delegation framework gives the proxy:

- Access to the Pending Approvals page and workflow notifications for pending approvals.

The Maintain Delegated Authority (HCDL_BATCH) Application Engine process grants the proxy the necessary access. Be sure to run this process regularly.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Delegation," Processing Batch Delegation Requests.

While a delegation is active, the proxy sees the delegated transactions in the Pending Approvals component; when the delegation period ends, any pending approval requests are removed from the proxy's queue and rerouted back to the delegator.

The Maintain Delegated Authority process does not grant access to the Recruiter Alerts pagelet, but if the proxy has access to the pagelet, the delegated approval transactions are also included in the proxy's alerts during the delegation period.

- Access to the Job Opening page through links on the Pending Approvals page and in workflow notifications.

Proxies are given access to the job opening through the Pending Approvals page, but proxies who do not otherwise have direct access to the Job Opening component (for example, using the Find Job Opening page) do not get direct access by virtue of being a proxy.

- Authority to approve, deny, or push back the transaction.

When a proxy takes action, the proxy's name appears in the job opening details as the approver of the job opening or job offer.

- Authority to modify job opening or job offer details, even if not part of the hiring team.

The Delegation Framework

PeopleSoft HCM applications use a common approval and delegation framework. This overview discusses:

- Delegation terminology.
- Delegation options.
- Delegation framework pages.

Note. This overview provides only basic information about the delegation framework, which is documented in detail in *PeopleSoft HRMS Application Fundamentals PeopleBook*.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Delegation"

Delegation Terminology

The following terms are important to understanding the delegation feature:

| | |
|----------------------------|---|
| Delegation | The act of giving one's authority to another user. |
| Delegator | A person that delegates authority to another user. |
| Proxy | A person granted authority to act on behalf of another user. |
| Delegated Authority | The rights and privileges that are given from the delegator to the proxy. |
| Delegation Request | A request from the delegator to the proxy to take on delegated authority. |
| Delegation Period | The time range in which the delegated authority is in effect. |

| | |
|---------------------------------|---|
| Delegation Administrator | The system administrator who is responsible for configuring, managing, and maintaining delegated authorities. |
| Revoke | When a delegator withdraws delegated authority. |

Delegation Options

The delegation framework supports the following types of delegation:

- Downward delegation of authority to a direct report or another person lower down in the reporting hierarchy.
- Upward delegation of authority to a manager or another person higher up in the reporting hierarchy.
- Lateral delegation of authority to a peer either within the same division or in a different division within the reporting hierarchy.

Note. To prevent situations of cascading or circular delegation chains, once the delegation framework passes delegated authority over a transaction to a proxy, the proxy cannot delegate authority over that transaction to another user. The delegation framework only passes authority over transactions from initial delegator to initial proxy.

Delegation Framework Pages

Use these pages to review and manage delegation data:

1. Review delegation transactions for workflow on the Register Workflow Transaction page.
See PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Delegation," Registering Workflow Transactions.
2. Review delegation permission lists and roles through PeopleTools Security components.
See PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Delegation," Setting Up Permission Lists and Roles for Delegation.
3. Define installation settings for delegation on the Delegation Installation Settings page.
See PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Delegation," Defining Delegation Installation Settings.
4. Review transactions for delegation on the Configure Delegation Transaction page.
See PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Delegation," Configuring Delegation Transactions.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Delegation," Navigating Delegation Components

Delivered Delegation Definitions for Recruiting

This overview discusses:

- Delivered workflow transactions.
- Delivered permission lists and roles for delegation.
- Installation Settings
- Delivered delegation transactions.

Delivered Workflow Transactions

Talent Acquisition Manager delivers these two approval transactions that are preconfigured for delegation:

| <i>Transaction Name</i> | <i>Transaction Type</i> | <i>Description</i> |
|-------------------------|-------------------------|-----------------------|
| JobOpening | Approve | Job opening approval. |
| JobOffer | Approve | Job offer approval. |

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Delegation," Registering Workflow Transactions

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Approvals," Linking Workflow Transactions

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Approvals," Setting Up Approval Process Definitions

Delivered Permission Lists and Roles for Delegation

Talent Acquisition Manager delivers permission lists that are required for use of the Delegation framework. This table describes the delivered recruiting roles for the delegation framework:

| <i>Role Name</i> | <i>Attached Permission Lists</i> | <i>Description</i> |
|-----------------------------|----------------------------------|---|
| Delegate_JobOpening_Approve | HCCPDL2021 (Approve Job Opening) | Provides access to the Pending Approvals component and to the pages needed to view job opening details. |

| Role Name | Attached Permission Lists | Description |
|---------------------------|----------------------------------|---|
| Delegate_JobOffer_Approve | HCCPDL2029 (Approve Job Offer) | Provides access to the Pending Approvals component and to the pages needed to view job offer details. |

Note. Generally, users who can access an existing job opening can create a new job opening using either the Create New or Clone icons at the top of the Job Opening page. However, these icons are hidden from proxies who are not recruiting users. The system determines if a proxy is a recruiting user by comparing the proxy's roles to the roles that you include on the Recruiting Roles page.

See [Chapter 6, "Setting Up Additional Recruiting Definitions," Identifying Recruiting Roles, page 89.](#)

The delegation framework provides additional permission lists for users and administrators of the delegation framework.

- The delegation administrator permission list, HCCPDL1000, is associated with the delivered HCM Delegation Admin role.
- The delegation user permission list, HCCPDL1100, enables delegation users (both delegators and proxies) access to the Manage Delegation home page.

When implementing delegations, make sure that all of your delegation users are associated with this permission list. As delivered, the permission list is associated with the Manager and Employee roles, but you must analyze delegation security requirements based on your organization's security configuration.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Delegation," Setting Up Permission Lists and Roles for Delegation

Enterprise PeopleTools PeopleBook: Security Administration

Installation Settings

Delegation installation settings control which users can be chosen as proxies. The settings are global (that is, they apply to all applications in your HCM system).

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Delegation," Defining Delegation Installation Settings.

Delivered Delegation Transactions

This table lists the delegation transactions delivered for Talent Acquisition Manager:

| Transaction Name | Transaction Type | Role |
|-------------------------|-------------------------|-----------------------------|
| Job Openings | Approve | Delegate_JobOpening_Approve |

| Transaction Name | Transaction Type | Role |
|-------------------------|-------------------------|---------------------------|
| Job Offers | Approve | Delegate_JobOffer_Approve |

Note. All transactions are delivered inactive.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Delegation," Configuring Delegation Transactions

The Delegation Process

This section provides an overview of delegation through self service.

Note. This overview provides only basic information about the delegation process, which is documented in detail in *PeopleSoft HRMS Application Fundamentals PeopleBook*.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Delegation," Working with Self-Service Delegation.

Delegator Delegates Approval Authority

A delegator follows these steps to delegate approval authority:

1. Navigate to the Manage Delegation component (Self Service, Manage Delegation).
2. Click the Create Delegation Request link.

Delegators who have multiple jobs will have to indicate the job for which they are delegating approvals.

3. Enter From Date and To Date for the delegation request, then click the Next button.
4. Select the transactions to be delegated (job opening approval, job offer approval, or both), then click the Next button.
5. Select a proxy.
6. Select the Notify Delegator check box, then click Submit.
7. Click OK.

The system generates a notification to the selected proxy.

Proxy Accepts Delegation Request

A proxy follows these steps to accept approval authority:

1. Navigate to the Manage Delegation component (Self Service, Manage Delegation).

2. Click the Review My Delegated Authorities link to access the My Delegated Authorities page.
3. Click the Accept button.

Alternatively, the proxy can click the Reject button to reject the delegation.

The Delegation Authority Ends

The delegator can manually revoke the delegation, or the delegation can end because it has reached its end date. In both cases, any pending approvals are removed from the proxy's queue and added back to the delegator's queue.

Chapter 10

Creating Job Openings

This chapter provides overviews of job openings and profile integration for job openings, then it discusses how to:

- Enter primary job opening information.
- Enter basic job opening data.
- Work with multiple job codes in a job opening.
- Add staffing and salary information.
- Add job qualifications.
- Add screening questions to a job opening.
- Set up screening for a job opening.
- Create job postings.
- Identify recruiting team members for a job opening.
- Create job openings from positions or from other job openings.
- Approve job openings.

Understanding Job Openings

This section discusses:

- Job opening data.
- Job opening creation methods.

Job Opening Data

Although the exact format of the job opening page depends on your template configuration, job opening information falls into these categories:

- Basic job opening data.

Every job opening template must include this section.

- Staffing and salary information.
- Qualifications
- Screening questions.
- Screening levels and criteria.
- Job posting information.
- Hiring team members.

Note. Other than the required section for basic job opening data, all sections on the Job Opening page are optional. They appear only when included in the relevant job opening template.

See [Chapter 7, "Setting Up Recruiting Templates," Setting Up Job Opening Templates, page 130.](#)

Basic Job Opening Data

Basic job information refers to data such as:

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

See [Chapter 10, "Creating Job Openings," Entering Basic Job Opening Data, page 227.](#)

Staffing and Salary Information

Once you have provided the job code, position ID, or both, the system automatically sets default values in many of the staffing and salary information fields. Much of this information can be used later as screening criteria.

See [Chapter 10, "Creating Job Openings," Adding Staffing and Salary Information, page 242.](#)

Qualifications

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

Other than a matrix that determines the minimum amount of work experience that is required for applicants with various levels of education, the qualification sections of a job opening are profile-based. That is, each type of qualification (say, competencies or degrees) has been defined in the Manage Profiles business process in PeopleSoft Enterprise Human Resources and then further configured for use in Talent Acquisition Manager.

The system provides options for automatically entering profile-based job qualification data by copying profile data from existing person or non-person profiles, and you can optionally configure the job opening template to include a section where you can review profile usage within the job opening.

Even if you import profile data from existing profiles, you can still remove, change, and add to the default profile data that the system enters in the job opening.

See [Chapter 10, "Creating Job Openings," Understanding Profile Integration for Job Openings, page 208](#) and [Chapter 3, "Setting Up Profile Integration," page 25](#).

See [Chapter 10, "Creating Job Openings," Adding Job Qualifications, page 246](#).

Screening Questions

If applicants apply for a job opening using PeopleSoft Enterprise Candidate Gateway, the application form includes any screening questions that are associated with a job opening and activated for screening. (However, you cannot use open-ended questions for prescreening).

Questions have their own scoring system, and during the screening process, questionnaire points are used in the determination of the applicant's overall screening results.

See [Chapter 10, "Creating Job Openings," Adding Screening Questions to a Job Opening, page 252](#).

Screening Levels and Criteria

Screening levels are defined on the Screening Definition page. They define the screening processing rules, not the actual screening criteria.

Screening levels can be linked to screening templates, which are in turn linked to recruitment templates. When you create a job opening, the template configuration thus provides a default set of screening levels for the job opening. You can add or delete screening levels as necessary.

Screening criteria defines the specific job requirements used by the system to compare an applicant's qualifications to those of the job opening for the specified screening level. Use the Job Opening Screening Criteria page to select job opening-specific criteria for each level.

The job opening attributes that are available for use as screening criteria fall into four groups:

- *General requirements* come from fields that you populate in the Job Information and Salary Information sections of the Job Opening page.
- *Education and experience requirements* come from the Education and Experience section of the Job Opening page.
- *Screening questions* are created outside of the job opening and then added to the Screening Questions section of the Job Opening page.
- *Profile content types* are job opening attributes whose properties are configured in the Manage Profiles module in PeopleSoft Human Resources.

See [Chapter 10, "Creating Job Openings," Setting Up Screening for a Job Opening, page 258](#).

Job Posting Information

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

See [Chapter 10, "Creating Job Openings," Creating Job Postings, page 277](#).

Hiring Team Members

Identify the recruiter, hiring manager, interview team, screening team, and any interested parties for the job opening. Members of any of these groups can access both the job opening and the data for any applicant who is associated with the job opening.

See [Chapter 10, "Creating Job Openings," Identifying Recruiting Team Members for a Job Opening, page 282](#)

.

Job Opening Creation Methods

There are three methods of creating job openings:

- Use the Create a New Job Opening (HRS_JO_LAUNCH) component to enter primary job opening information, then continue to the Job Opening (HRS_JOB_OPENING) component to enter complete data for the job opening.
- Use the Create Job from Position (HRS_CRJOB) process to create job openings from open positions.
- Use the Clone Job Opening (HRS_JO_CLONE_SEC) component to create a new job opening by copying an existing one.

Note. If job opening approvals and delegations are active, and if the authority to approve job openings is delegated to a proxy, the proxy is able to access the job opening data. Generally, users who can access an existing job opening can create a new job opening using either the Create New or Clone icons at the top of the Job Opening page. However, if the proxy does not belong to a recruiting role, these icons are hidden.

See Also

[Chapter 10, "Creating Job Openings," Creating Job Openings from Positions or from Other Job Openings, page 287](#)

Understanding Profile Integration for Job Openings

This overview discusses:

- Profile architecture.
- Profile integration options.
- Full profile integration.
- Limited profile integration.

Profile Architecture

You create and manage profiles using the Manage Profiles business process in PeopleSoft Human Resources. To understand profile integration for job openings, you must be familiar with profile architecture, including these terms:

| | |
|---------------------------|--|
| Profile | <p>An organized collection of data that represents attributes of a person or of a business object such as a job code.</p> <p>Profiles are widely used by organizations to describe the attributes of jobs or individuals. Typically, profiles summarize the competencies, qualifications, and skills of a job or a person.</p> |
| Content Type | <p>A category of information in a profile. Delivered content types that support recruiting processes include competencies, languages, memberships, degrees, licenses & certificates, and so forth.</p> |
| Content Item | <p>A specific attribute that is associated with a particular content type. For example, for the content type <i>Competencies</i>, content items are specific competencies such as analytical thinking or the ability to prioritize tasks.</p> |
| Instance Qualifier | <p>A value that is used to organize and filter content items. For example, competency ratings are organized according to the evaluation type (self-evaluation, manager evaluation, and so forth). This is possible because the evaluation type is being used as an instance qualifier.</p> |
| Profile Type | <p>Profile types define the structure of your profiles. A profile type includes content types, but not content items. That is, a particular profile type might include content types such as competencies and memberships, but it does not reference particular competencies or particular memberships.</p> <p>The profile type also defines whether the profile is linked to person IDs to create person profiles, or linked to business entities, such as job code or positions, to create non-person profiles.</p> <p>Four profile types are delivered as system data. Use the CLUSTER, ROLE, and JOB profile types to create non-person profiles, and the PERSON profile type to create profiles that describe your employees.</p> |

Primary Person Profile Type A specific person profile type that you select on the Assign Profile Defaults page. The system uses this profile type to identify the content types that are available for use in Talent Acquisition Manager.

Although all content types in the primary person profile type are available for use, you can configure the system to use a subset of the content types on specific pages.

- The Content Section Configuration page controls which content types are available to use in resume templates and job opening templates.

It also controls the content type properties that are available for use in screening.

See [Chapter 5, "Setting Up Screening Processes," Making Content Types Available for Screening, page 69.](#)

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

See [Chapter 7, "Setting Up Recruiting Templates," Setting Up Resume Templates, page 115.](#)

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

See [Chapter 7, "Setting Up Recruiting Templates," Setting Up Job Opening Templates, page 130.](#)

- All of the content types appear on the Application Data page, where you enter profile information that might be applied to any job opening.

See [Chapter 11, "Entering Applicant Data," page 299.](#)

Profile Integration Options

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

You can also update a non-person profile that is designated as the primary profile for the job opening directly from the job opening. For example, when you are creating a job opening, the hiring manager might provide updated requirements that you can then transfer back to the job profile, maintaining consistency and eliminating redundant work efforts. The updates happen only if the Update Primary Profile check box for the primary profile is selected, and only if the job opening has an open status.

The system provides two options for adding profile-based job qualification data to job openings:

- Full profile integration, which enables you to copy profile data from existing person or non-person (job) profiles that you explicitly identify.

For example, when replacing a key employee, you can copy attributes such as competencies from the employee's profile into the job opening. Similarly, you can pull requirements from a job profile.

- Limited profile integration, which automatically populates profile data using job profiles that are associated with the job code, job family, position, or salary grade for the job opening.

This option is intended for use when full profile integration is *not* active. Although the system does not prevent you from using this option in addition to full profile integration, Oracle does not recommend this configuration.

Full Profile Integration

Full profile integration enables users to explicitly select the profiles whose content items are to be copied into the job opening. Existing profile content comes from both person and non-person profiles. When you activate full profile integration on the Recruiting Installation - General page, you choose whether to use both types of profiles or only non-person profiles.

Profile Selection and Usage

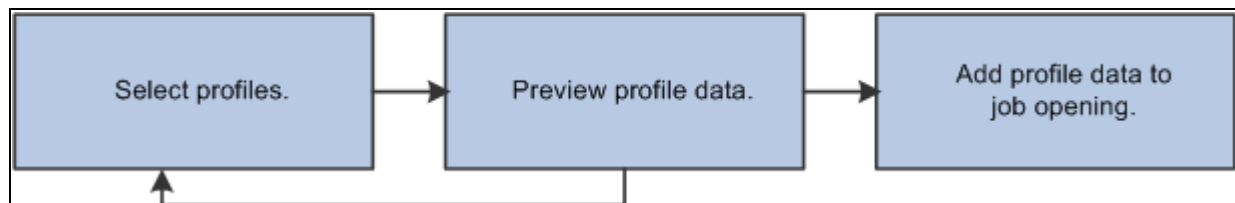
Under full profile integration, you select profiles with content that you want to copy into the job opening. You select these in the Person Profile grid and the Non-Person Profile grid on the Primary Job Opening Information page, before you access the main Job Opening page.

In addition to the profiles that you explicitly select in these grids, the system also uses JOB profiles that are associated with other job opening data that you enter on the Primary Job Opening Information page. Data elements that can be associated with profiles include job codes, position numbers, job families, and salary grades.

Also, if you segment your job openings by job profile, there is an additional Job Profile field on the page, separate from the grids where you otherwise identify profiles to use. If you segment by job profile, this is a required field, and the profile you enter is treated the same as any other profile from which the system copies data. (Note, however, that the Non-Person Profile grid accepts any non-person profile, while the separate Job Profile field accepts only JOB profiles.)

Before the system displays the job opening, it displays a preview page that shows you the profile data that will be pulled from the selected profiles. You can review the data and then decide whether to continue to the job opening or return to the previous page to change your profile selection.

This diagram illustrates the process of selecting profiles, previewing their content, and adding the content to the job opening:



Profile selection process

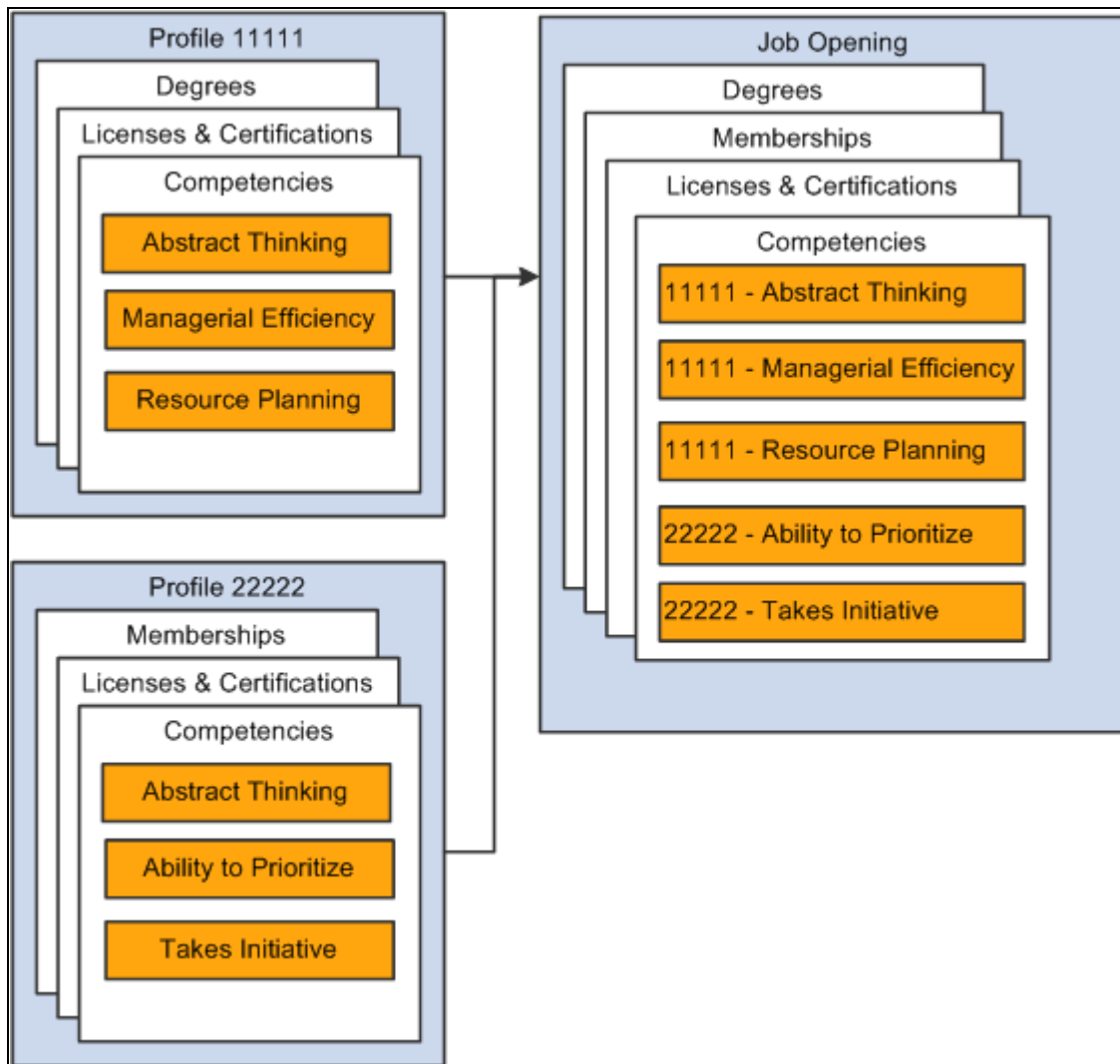
Profile Copying

When the system copies profile data, it copies only the content items for the content types that appear in the job opening. (The content types in a job opening depend on the job opening template). For example, if the job opening has sections for competencies and degrees, but not for language skills, then any language skills in the source profile are not copied to the job.

The system copies content items only if the content type structure is the same in the source profile and in the primary person profile type. Additionally, only content items with the same instance qualifier setup as the primary person profile type are copied. For example, if you select a nonperson ROLE profile to copy, but its instance qualifiers for competencies are different from those of the competency content type in the primary person profile type, then any competencies associated with the ROLE profile are not copied into the job opening.

Note. When copying content items with instance qualifiers, the system copies only items with instance qualifiers that are viewable by employees. The ability for employees to view specific instance qualifiers is part of the instance qualifier setup in the Manage Profiles business process.

This diagram illustrates the flow of content items from the source profiles into the job opening. In the diagram, the system copies data from two profiles into the job opening. Competencies from both profiles are added to the job opening, and each competency in the job opening retains information about the profile from which it came.



Consolidating profile content from multiple profiles

Note. Competencies that exist in both source profiles are added to the job opening only once. If multiple profiles have the same content item (for example, an identical competency), and one profile has a version with a later effective date, then the system brings that later version and its Profile ID into the job opening.

The Primary Profile and Profile Updates

When you copy data from multiple profiles into a job opening, you must designate one of the profiles as the primary profile. Any content items that you add to the job opening are associated with the primary profile, unless there is a profile type configuration incompatibility, in which case the profile ID for the new content item is 0. (The system also assigns a profile ID of 0 when there are no profiles associated with the job opening.)

If the primary profile is a non-person profile, you have the option to update the profile based on changes you make to the job opening data; to activate this option, select the Updates Allowed check box for the primary profile.

For example, when you create a job opening, the hiring manager might provide updated requirements that you can then transfer back to the job profile, maintaining consistency and eliminating redundant work efforts.

Competency Evaluation Types in Job Openings

In job openings, content types represent desirable (or required) attributes for applicants. For many content types, the applicant either will or won't have the attribute. For example, for the Licenses & Certifications content type, an applicant who has a particular content item has the license and meets the requirement.

Competencies present a more complex situation because they include a rating scale and an evaluation type. The evaluation type indicates who assigned the rating. When a competency is copied from a profile into a job opening, it is important to respect settings that prevent employees from seeing the ratings associated with specific ratings types. For example, the delivered configuration for competency items does not permit employees to see peer evaluations.

Profile architecture uses the concept of an *Instance Qualifier* to organize content types according to specified data. In the case of competencies, the evaluation type is the instance qualifier. The instance qualifier setup for competencies not only lists the evaluation types, it indicates which ones employees can view (for example, employees can view manager evaluations, but not peer evaluations), and which one is the default value for employees (for competencies, *Self* is the employee default).

Talent Acquisition Manager processes job opening content items with instance qualifiers according to these rules:

- Content items are copied only if the instance qualifier configuration for the source profile's profile type matches the instance qualifier configuration for the primary person profile type.

For example, if the primary person profile type uses the evaluation type as an instance qualifier for competencies, then the system copies competency content items only from profiles that also use the evaluation type as an instance qualifier.

- When the system copies content items into a new job opening, it copies only items that are visible to employees.

For example, competency ratings with the evaluation type *Peer* are not copied to the job opening.

- When the system copies content items into a new job opening, it copies only the latest effective-dated content items in the profile are copied.

For example, if an employee enters annual self-evaluations for competencies, the content item representing the most recent self-evaluation is copied into the job opening.

- When a content type is used in screening, the description of the content items shows the instance qualifier.

For example, if the Competencies grid in a job opening includes two rows for analytical thinking, one row for a self-evaluation and one row for a supervisor/manager evaluation, then when you set up screening for the job opening, the list of available screening requirements includes two rows for the analytical thinking competency, one row where the description shows that this is for a Supervisor/Manager proficiency rating, and one where the description shows that it is for a Self proficiency rating.

Note. Under the delivered configuration, competency evaluation types and ratings are included when you add a competency to a job opening, but the rating is informational only. That is, the screening process does not check if the applicant has the rating that appears in the job opening. Instead, the screening process awards applicants points based on the applicant's rating and the points scale that you establish in the screening criteria. You can, however, configure the system to screen for a specific rating (for example, to check whether the applicant has a self-evaluation proficiency of *Excellent* for a particular competency).

See Also

[Chapter 2, "Defining Installation Options for Recruiting," Defining General Settings for Templates, Approvals, and Integrations, page 11](#)

Limited Profile Integration

Limited profile integration, also known as job profile integration, automatically populates profile data using non-person JOB profiles that are associated with the job code, job family, position, or salary grade for the job opening.

Unlike full profile integration, which is configured at the system level, limited profile integration is configured in recruitment templates. To enable limited profile integration, select a value other than *Not Used* in the Load Requirements from Job Profile field. The options are *Job Code*, *Job Family*, *Position*, and *Salary Grade*.

When a user enters the specified type of data as part of the primary job opening information, the system looks for profiles with the default nonperson profile type that are associated with the specific job code, job family, position number, or salary grade. If it finds one or more such profiles, it copies content items from the profiles to the corresponding content type section in the job opening. Content types that are not part of the job opening templates are ignored.

Note. This option provides backwards compatibility with releases prior to PeopleSoft 9.1. Although the system does not prevent you from using this option in addition to full profile integration, Oracle does not recommend this configuration. Full profile integration enables you to pull information from up to three explicitly identified profiles into job openings, and if the system attempts to pull in additional profile data as well, there can be errors if the total number of profiles from both sources exceeds three. Additionally, the automatic use of profiles in addition to the ones that the user explicitly identifies could be confusing to users.

See Also

[Chapter 7, "Setting Up Recruiting Templates," Setting Up Recruitment Templates, page 149](#)

Entering Primary Job Opening Information

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

- Enter primary job opening information.
- Review profile data and choose a primary profile.

Understanding Primary Job Opening Information

When you create a job opening, you enter the information in two stages. First, you enter basic data on the Primary Job Opening Information page. Data that you enter here determines certain default content for the main job opening page. The data that you enter here also determines the recruitment template for the job opening, which in turn determines the job opening template that controls the structure and layout of the main Job Opening page.

This section discusses the information that you enter on the Primary Job Opening Information page and describes how the system uses this information on the main Job Opening page.

Job Opening Type

When you create a new job opening, you indicate the job opening type on the Primary Job Opening Information page. You cannot change the type after you move on to the Job Opening page.

There are two types of job openings.

A *standard requisition* is an opening for a specific job or position that you want to fill. You must provide specific data regarding the job or position code. Standard requisitions can represent multiple job codes if you've configured the Recruiting Installation - Jobs page to allow this.

A *continuous job opening* is an opening that represents a job for which your organization is always hiring. This type of job opening can be used as a place holder for possible candidates and can potentially remain open for an indefinite amount of time. If your company uses Performance Management, continuous job openings are not used in Time to Fill reporting.

Continuous job openings require only a job posting title. They do *not* require a job code or position number. However, if a continuous job opening doesn't have position or job code data, users will have to specify the position number or job code when making job offers and hiring applicants for the opening.

The specific data requirements depend on your position management settings:

- *Full position management:* A position number is required when making an offer or preparing an applicant for hire.
- *Partial position management:* You can submit a job offer without a position or job code, but you will not be able to prepare the applicant for hire without at least a job code.

Business Unit

You must enter a business unit on the Primary Job Opening Information page. The business unit controls the available values for various business unit-controlled or setID-controlled job opening fields such as position number, job code, location, and recruiting location.

Segmenting Values

Every job opening is associated with a recruitment template that controls the layout and content of various pages that you use during the recruiting process. The overall recruitment template that is associated with a specific job opening references five other templates that control specific pages. For example, the recruitment template references a job opening template, which controls what a recruiter sees on the main Job Opening page, and a resume template, which controls what an applicant sees when applying for that particular job opening online.

When you set up recruitment templates, you can associate them with specific values for the segmenting type that you choose in the Recruiting Installation - General page. For example, if the segmenting type is *Department*, then you can associate different recruitment templates with different departments in your organization. This enables you to vary the layout and content of the job opening pages based on the department.

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

For example, if your job openings are segmented by department, then the Primary Job Opening Information page displays a required Department field. When you create a job opening, you must select a department. If there is a recruitment template associated with that department, then the system uses that template. Otherwise, the job opening uses the system's default template. You identify separate default templates for standard requisitions and for continuous job openings on the Recruiting Installation - General page.

Profile Utilization

If you use full profile integration, the Primary Job Opening Information page displays page elements that you use to select the profiles that the system uses to prepopulate qualifications sections. There is a field for choosing whether to use person profiles (if allowed), non-person profiles, both or neither. Depending on your selection, the page also displays grids for selecting profiles of each type.

Posting Title

You must enter a primary posting title on the Primary Job Opening Information page. The system uses this as the default job posting title when you create the job opening's first job posting. After you have created one or more job postings for the job opening, you set the primary posting title by selecting the posting to use for that purpose.

Pages Used to Enter Primary Job Opening Information

| Page Name | Definition Name | Navigation | Usage |
|---------------------------------------|------------------------|---|--|
| Enter Primary Job Opening Information | HRS_JO_LAUNCH | Recruiting, Create New Job Opening, Enter Primary Job Opening | Enter primary job opening information. |
| Person Profile | JPM_PROFILE_PERS | Click a View Profile link in the Person Profile grid on the Enter Primary Job Opening Information page. | Preview information for a person profile whose attributes you are bringing into a new job opening, and . |
| Non-person Profile | JPM_PROFILE1 | Click a View Profile link in the Non-person Profile grid on the Enter Primary Job Opening Information page. | Preview information for a non-person profile whose attributes you are bringing into a new job opening. |

| Page Name | Definition Name | Navigation | Usage |
|-----------------------------------|-------------------|--|--|
| View Combined Profile Information | HRS_JO_PREFL_PRVW | Enter profiles and then click the Continue button on the Enter Primary Job Opening Information page. | Review the profile characteristics that are being brought into the job opening from the profiles you selected. |

Entering Primary Job Opening Information

Access the Enter Primary Job Opening Information page (Recruiting, Create New Job Opening, Enter Primary Job Opening).

Create New Job Opening

Enter Primary Job Opening Information

Select a Job Opening Type and Job Family then add Profile IDs or any other information you require to create a Job Opening. Select Continue once you have entered all required information.

Opening Information

Job Opening Type:

Business Unit: Global Business Institute BU

Job Family: Finance

***Profile Utilization:**

Person Profile Customize | Find | View All | First 1 of 1 Last

| Empl ID | View Profile | |
|-------------------------------------|--------------------------------|--|
| <input type="text" value="KU0007"/> | Betty Locherty | |

[+ Add Person Profile](#)

Non-person Profile Customize | Find | View All | First 1 of 1 Last

| Profile ID | View Profile | |
|-------------------------------------|-------------------------------------|--|
| <input type="text" value="100886"/> | Analyst - Financial | |

[+ Add Non-person Profile](#)

Position:

Posting Title:

Enter Primary Job Opening Information page

Job Opening Type Select whether this is a *Standard Requisition* or a *Continuous Job Opening*.

Business Unit Select the business unit associated with the job opening. The business unit defaults to the business unit of the person creating the job opening.

The selected business unit controls which values can be entered in many other job opening fields. It does not control values for the profiles that you enter in Person Profiles grid and the Non-Person grid, however it does filter the profile identities (job codes, positions, and so forth) that the system brings from the profiles into the job opening.

Page Elements Based On Segmenting Type

The Enter Primary Job Opening Information page displays a field that corresponds to the value in the Template Segmenting Type field on the Recruiting Installation - General page. Because this page already includes Business Unit and Job Code fields, no additional fields appear when the segmenting type is *Business Unit* or *Job Code*.

For example, if you segment job openings by company, then the Company field appears, and the value you enter determines which recruiting template is used for the job opening. If there isn't a template that is associated with the specific value you enter, the default template for the job opening type (continuous job opening or standard requisition) is used.

The field that corresponds to the segmenting is required, with one exception: continuous job openings do not require a job code even if job code is the segmenting type.

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

Select the company associated with the job opening.

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

Select the department associated with this job opening.

Job Family This field appears when the Template Segmenting Type field on the Recruiting Installation - General page is set to *Job Family*.

Select the job family associated with this job opening.

Job Profile

This field appears when the Template Segmenting Type field on the Recruiting Installation - General page is set to *Job Profile*.

Select the job profile that is associated with this job opening.

Available profiles include non-person JOB profiles.

If the recruiting template for the job opening is configured to load job requirements from the profile that you enter, then the qualifications that are associated with the selected profile are added to the job opening when you continue to the main Job Opening page.

If both profile segmentation and profile utilization are active, the profile that you enter in this field counts toward the limit of three profiles per job opening. Although it is possible to enter the same profile here and in the Non-person Profile grid, doing so is redundant, and the system brings the profile content into the opening only once.

Salary Admin Plan
(salary administration plan) and **Salary Grade**

These fields appear when the Template Segmenting Type field on the Recruiting Installation - General page is set to *Salary Grade*.

Select the salary administration plan and salary grade that are associated with this job opening.

Profile Utilization**Profile Utilization**

This field appears only if you've configured the system to allow profile utilization by setting the Allow Profile Utilization field on the Recruiting Installation - General page to *Yes*.

Select the types of profiles that you will select in order to bring profile characteristics into this job opening.

The *No Profiles* and *Non-person Profiles* options are always available. Additionally, if you've configured the system to allow person profile utilization (the Person Profile Integration field on the Recruiting Installation - General page is set to *Yes*), then options for *Person Profiles* and *Combined Profiles* are also available.

The value you select controls whether the Person Profile and Non-person Profile grids appear on this page. Neither grid appears if you select *No Profiles*. If either of these grids disappears because you change the value of this field, any data in the grid is cleared and is no longer used for the job opening.

Person Profile

This grid appears only if the Profile Utilization is *Person Profiles* or *Combined Profiles*.

Note. You can enter a maximum of three profile IDs on this page using any combination of the Person Profile grid, the Non-person Profile grid, and the segmenting type field. For example, if you segment by job code, and you enter a job code that has a profile, then that profile counts toward the limit of three profiles per job opening. (Similarly, if you segment by Job Profile, the profile that you enter in the segmenting field counts toward the limit. However, this is not a common configuration.)

Empl ID (employee ID) Enter the employee IDs for the people whose profile data you want to bring into the job opening. Profile security applies: administrators can select any profile, other users can select only their own profile and the profiles of their direct reports.

See [Chapter 3, "Setting Up Profile Integration," Setting Up Profile Integration for Job Openings, page 31.](#)

View Profile Displays the name of the person whose profile you entered. Click the link to access the Person Profile page so that you can preview the characteristics of the selected profile.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles, "Managing Profiles," Creating and Updating Person Profiles.*

Non-person Profile

This grid appears only if the Profile Utilization is *Non-person Profiles* or *Combined Profiles*.

Note. You can enter a maximum of three profile IDs on this page using any combination of the Person Profile grid, the Non-person Profile grid, and the Job Profile field that appears if you segment your job openings by job profile. Generally, if the Person Profile and Non-person Profile grids appear on this page, the Job Profile field does not. However, it is possible to configure the system so that all three page elements are present.

Profile ID Enter the profile IDs for the non-person profiles whose data you want to bring into the job opening.

You can select any type of non-person profile; the primary non person profile type is not relevant to this field.

View Profile Displays the name of the profile you entered. Click the link to access the Non-person Profile page so that you can review (though not update) the characteristics of the selected profile.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles, "Managing Profiles," Creating and Updating Non-Person Profiles.*

Additional Page Elements

Position Optionally select the position number for the job opening. This field appears when Position Management Option on the HRMS Options page is set to *Full* or *Partial*.

When job openings are segmented by business unit, department, job family, or job profile, you must enter a segmenting value before entering a position, as the segmenting value (along with the business unit) controls which positions are available for selection.

When job openings are segmented by company, job code, or salary grade, you can select a position without first entering a segmenting value.

| | |
|----------------------|---|
| Job Code | <p>This field appears when the Template Segmenting Type field on the Recruiting Installation - General page is set to <i>Job Code</i>. Regardless of the segmenting type, it also appears when Position Management Option on the HRMS Options page is set to <i>None</i> or <i>Partial</i>.</p> <p>Select the job code associated with this job opening.</p> <p>For continuous job openings, this field is optional, even if job openings are segmented by job code.</p> <p>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.</p> |
| Posting Title | <p>Enter an initial primary posting title. You can change this at any point using the Job Postings section on the Job Opening page.</p> |
| Continue | <p>Click this button to continue creating the job opening.</p> <p>If you entered data in the Person Profiles grid or the Non-Person Profiles grid, the system displays the View Combined Profile Information page. Otherwise, you proceed directly to the Job Opening page.</p> |

Reviewing Profile Data and Choosing the Primary Profile

Access the View Combined Profile Information page (enter profiles and then click the Continue button on the Enter Primary Job Opening Information page.)

Note. This page appears only if you use full profile integration.

View Combined Profile Information

Job Specifications for Standard Requisition

Select a Primary Profile and a Primary Job Code and/or Position for the Job Opening. If the Primary Profile is a Non-person profile, you can select the Update Primary Profile checkbox to allow any updates to items in the Job Opening to flow through to the Primary Profile in Profile Management. Change the posting title if required. View the profile items that will be imported into the Job Opening. If the proposed content of the new Job Opening does not suit, select Return to Previous Page to start again. To create the Job Opening select Continue.

| Profile Combination | | | |
|---|-----------------------------|-------------------------------------|--------------------------|
| Customize Find View All First 1-3 of 3 Last | | | |
| Profile ID | Description | Primary Profile | Update Primary Profile |
| KU0007 | Person - Betty Locherty | <input type="checkbox"/> | <input type="checkbox"/> |
| 100886 | Job - Analyst - Financial | <input type="checkbox"/> | <input type="checkbox"/> |
| 19000070 | Job - Analyst-Financial Sr. | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

| Profile Associations | | | | | |
|--|-----------------------|-----------------------------|-------------------------------------|-------------------------------|-------------------------------------|
| Customize Find First 1-3 of 3 Last | | | | | |
| Profile ID | Description | Jobcode | Primary Job Code | Position | Primary Position |
| 19000070 | Analyst-Financial Sr. | 140040-Analyst-Financial Sr | <input checked="" type="checkbox"/> | 19000070-Sr Financial Analyst | <input checked="" type="checkbox"/> |
| 100886 | Analyst - Financial | 140020-Analyst-Business | <input type="checkbox"/> | | <input type="checkbox"/> |
| 100886 | Analyst - Financial | 140035-Analyst-Financial | <input type="checkbox"/> | | <input type="checkbox"/> |

Posting Title:

View Combined Profile Information page (1 of 3)

| ▼ Areas of Study Customize Find View All First 1 of 1 Last | |
|--|----------------------|
| Profile ID | Areas of Study |
| KU0007 | Financial Management |

| ▼ Competencies Customize Find View All First 1-5 of 19 Last | |
|---|-------------------------------|
| Profile ID | Competencies |
| KU0007 | Abstract thinking |
| KU0007 | Takes initiative & follows up |
| KU0007 | Resource Planning |
| KU0007 | Provides Direction |
| KU0007 | Managerial Efficiency |

| ▼ Degrees Customize Find View All First 1-2 of 2 Last | |
|---|--------------------------|
| Profile ID | Degrees |
| 100886 | Bachelor of Science |
| KU0007 | Master of Business Admin |

View Combined Profile Information page (2 of 3)

| Licenses & Certifications | |
|---------------------------|-------------------------------|
| Profile ID | Licenses & Certifications |
| KU0007 | Assoc Chartered Certif Acctnt |

| Language Skills | |
|-----------------|-----------------|
| Profile ID | Language Skills |
| KU0007 | English |
| KU0007 | Swedish |

| Memberships | |
|-------------|---------------------------|
| Profile ID | Memberships |
| KU0007 | Alliance of Govt Managers |

| Tests/Examinations | |
|--------------------|--------------------------|
| Profile ID | Tests/Examinations |
| 100886 | Accounting Aptitude Test |
| KU0007 | Business Mathematics |

[Continue](#)

[Return to Previous Page](#)

View Combined Profile Information page (3 of 3)

Profile Combination

This grid lists the profiles whose attributes you are bringing into the job opening. It lists both person and non-person profiles.

Note. You cannot change your profile selection on this page. To change your profile selection, return to the Primary Job Opening Information page.

Profile ID

Displays the profile ID. When you review specific content items that system copied into the job opening, the profile ID for the content item indicates which profile supplied the data.

Description

Displays the type of profile and the profile name. For example, a person profile description follows the format *Person - <Person Name>*.

Primary Profile You must select one of the profiles as the primary profile for the job opening. Any content items that you add to the job opening are associated with the primary profile, unless there is a profile type configuration incompatibility, in which case the profile ID for the new content item is 0.

Update Primary Profile If the primary profile is a non-person profile, select this check box if you want to update the profile based on the job opening profile. For example, when you are creating a job opening, the hiring manager might provide updated requirements that you can then transfer back to the job opening's primary non-person profile, maintaining consistency and eliminating redundant work efforts. Copying occurs only when the job opening has an open status.

The system updates the profile when you save the job opening after adding new content items or after modifying or removing content items that came from the primary profile.

Note. You cannot update person profiles from the job opening.

Profile Associations

This grid lists the job codes and positions that are associated with the profiles that you are using. If any of the profiles were derived from job code or position data that you entered on the Primary Job Opening Information page, then that job code or position necessarily appears in the grid.

Primary Job Code Select a primary job codes and position. The system enters the selected job code into the job opening.

Note. Position information appears only under full or partial position management.

Content Types and Content Items

The page displays grids for each profile content type that is valid for the job opening. (Valid profile content types are those that are included in the job opening template.) Each grid lists the specific content items that are to be loaded into the job opening. For example, the Competencies grid lists specific competencies.

Profile ID Identifies the profile that provided the content type. For example, if you load Betty Locherty's person profile and the Director of Finance job profile, the Competencies grid lists both Betty's competencies and the job competencies; this field lets you know which profile a specific competency came from.

If multiple profiles have the same item (for example, an identical competency), and one profile has a version with a later effective date, then the system brings that later version and its Profile ID in the grid for that content type.

<content item> The second column in each grid displays the name of the specific content item that is to be loaded to the job opening. For example, in the Competencies grid, this column shows the name of the competency.

<items> were not loaded due to Profile Type configuration incompatibility. This message, with details about the number and type of items, appears when the system is unable to load content items from a profile that you selected. The system can import profile content only when the content type is compatible with the format that is used in the job opening. Specifically, the format that is used in the job opening is the one in the default person profile type for the system.

Entering Basic Job Opening Data

This section discusses how to:

- Enter basic job information.
- Add locations to job openings.
- (USF) Enter candidate name requests.

Pages Used to Enter Basic Job Opening Data

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|-------------------------|------------------------|---|--------------------------------------|
| Job Opening | HRS_JOB_OPENING | <ul style="list-style-type: none"> Recruiting, Create New Job Opening, Enter Primary Job Opening Information Click the Continue button on the Enter Primary Job Opening page (and, if applicable, on the View Combined Profile Information page). Recruiting, Find Job Openings, Find Job Openings Click a job opening to access the Job Opening page, then access the Job Opening Details tab. Recruiting, Browse Job Openings, Browse Job Openings Click a job opening to access the Job Opening page, then access the Job Opening Details tab. | Enter job opening details. |
| Locations | HRS_JO_LOC_SEC | Click the Add Additional Locations link on the Job Opening page. | Add locations to job openings. |
| Candidate Name Requests | HRS_JO_NM_SEC | Click the Candidate Name Request link on the Job Opening page. | (USF) Enter candidate name requests. |

Entering Basic Job Information

Access the Job Opening page (select Recruiting, Create New Job Opening, then click the Continue button on the Enter Primary Job Opening page and, if applicable, on the View Combined Profile Information page).

Access the Opening Information section.

Create New Job Opening

Job Opening

Posting Title: File Clerk
Job Opening Status: 005 Draft
Job Title: File Clerk **Job Code:** NF0035
Position Number: NF000051 File Clerk
Business Unit: NFSBU Federal Recruiting Solutions
Job Family: NF2000 RS Fed Clerical job family

 [Previous Step](#) [Next Step](#)

Opening Information

***Template ID:** Requisition Default
Job Opening Type: Standard Requisition
Created By: Betty Locherty
Created:
***Openings to Fill:**
Target Openings:
Available Openings:
Establishment ID:
Business Unit: Federal Recruiting Solutions
Position Number: File Clerk
Job Code: NF0035 File Clerk

Job Opening page: Opening Information Section (1 of 3)

| | | | |
|--------------------------------|--|--|-----------------------------|
| Company: | NF | | National Science Foundation |
| Department: | NF002 | | Corporate |
| Location: | | | |
| Recruiting Location: | | | |
| | Add Additional Locations | | |
| Status Code: | 005 Draft | | |
| Status Reason: | | | |
| *Status Date: | 06/12/2009 | | |
| Desired Start Date: | | | |
| Encumbrance Date: | | | |
| Projected Fill Date: | | | |
| Date Authorized: | | | |
| Referral Program ID: | | | |
| *Recruitment Type: | | | |
| *Area of Consideration: | | | |
| Recruitment Contact: | | | |
| Draft Status: | | | |
| Country: | USA | | United States |
| Citizenship Status: | | | |
| Minimum Age: | | | |
| Maximum Age: | | | |
| Gender: | | | |
| | Candidate Name Requests | | |

Job Opening page: Opening Information Section (2 of 3)

| Priority Placement Considerations | | Customize | Find | First | 1 of 1 | Last |
|---|----------------|-----------|------|-------|--------|------|
| *Program | | | | | | |
| | | | | | | |
| + Add Priority Placement Programs | | | | | | |
| Employees Being Replaced | | Customize | Find | First | 1 of 1 | Last |
| Name | Empl ID | | | | | |
| | | | | | | |
| + Add Employees Being Replaced | | | | | | |

Job Opening page: Opening Information Section (3 of 3)

Note. Certain fields in these sections appear only in U.S. federal installations.

See [Chapter 7, "Setting Up Recruiting Templates," page 113.](#)

Save Processing for New Job Openings

The available save options depend on whether approvals are required:

- | | |
|------------------------|---|
| Save as Draft | Click to save the job opening and set the job opening status to <i>Draft</i> . This button is available regardless of whether approval is required. |
| Save and Open | Click this button to save the job opening and set the job opening status to <i>Open</i> . This button is available only if no approval is required. |
| Save and Submit | Click this button to save the job opening and set the job opening status to <i>Pending Approval</i> . This action also sends a notification to the approver. This button is available only if approvals are required. |

Opening Information

- | | |
|-------------------------|--|
| Template ID | <p>Select a recruitment template to associate with the job opening.</p> <p>The system determines the default value for this field based on the Template Segmenting Type entered on the Recruiting Installation - General page, the Segmentation Values entered on the Recruitment Template - Segmentation Values page, and the job data that you enter.</p> <p>This field is visible only to users with administrator privileges.</p> <p>See Chapter 2, "Defining Installation Options for Recruiting," Setting Up Talent Acquisition Manager Installation Settings, page 10.</p> <p>See Chapter 7, "Setting Up Recruiting Templates," Assigning Segmentation Values to Recruitment Templates, page 152.</p> |
| Job Opening Type | Displays the type of job opening selected on the Enter Primary Job Opening Information page: <i>Standard Requisition</i> or <i>Continuous Job Opening</i> . |
| Created By | <p>Enter the employee ID for the person you want assigned to the creator role for this job opening.</p> <p>The value defaults to the ID of the user that initiated the creation of the job opening.</p> |
| Created | Enter the date on which the job opening was created. The default date is today's date. |

| | |
|---------------------------|---|
| Openings to Fill | Specify whether the openings are: <ul style="list-style-type: none"> • <i>Limited</i>: Enables the Target Openings and Available Openings fields to appear. The system closes the job opening when all openings are filled. • <i>Unlimited</i>: Hides the Target Openings and Available Openings fields and the job opening stays open until it is manually closed. |
| Target Openings | Enter the number of positions that are to be filled. This field appears only if you select <i>Limited</i> in the Openings to Fill field. |
| Available Openings | This field displays the number of available openings only if <i>Limited</i> was selected in the Openings to Fill field. The initial number of openings is the value entered in the Target Openings field. When you hire an applicant in this job opening, the system decreases this number by one. When all available positions are filled, the status of the job opening is set to <i>Closed</i> . The total <i>Available Openings</i> is always less than or equal to the <i>Target Openings</i> . |
| Establishment ID | Select the Establishment ID for this job opening. The value defaults to the establishment ID assigned to the job code or position ID. |
| Business Unit | Select a business unit. The default value is the value that you entered on the Enter Primary Job Opening Information page. |
| Position Number | Select a position number. This field defaults to the value, if any, entered on the Enter Primary Job Opening Information page. This field is available when the system allows only one position number in a job opening (that is, if Allow multiple jobs/positions is not selected on the Recruiting Installation - Jobs page). <hr/> Note. If the Recruiting Installation - Jobs page is configured to allow multiple jobs or positions in a job opening, this field is replaced by a Positions grid that appears farther down on the page <hr/> |
| Job Code | Select a job code. The default value is the value, if any, that you entered on the Enter Primary Job Opening Information page. This field is available when the system allows only one job code in a job opening (that is, if Allow Multiple Jobs/Positions is not selected on the Recruiting Installation - Jobs page). <hr/> Note. If the Recruiting Installation - Jobs page is configured to allow multiple jobs or positions in a job opening, this field does not appear. Instead, a job code scroll area appears for those job opening sections where each job code has its own settings. <hr/> |
| Company | Select a company. The default value is the value, if any, that you entered on the Enter Primary Job Opening Information page. |
| Department | Select a department. The default value is the value, if any, that you entered on the Enter Primary Job Opening Information page. |

| | |
|---|---|
| Location | Select a location code for the location of this job opening. |
| Recruiting Location | Select a recruiting location that you want displayed when a applicant searches for a job opening. When applicants use Candidate Gateway to search for job openings, geographical searches look for job openings based on their recruiting locations, not their (actual) location. For example, the (actual) location might be a specific city, while the recruiting location used for searches might be a broader metropolitan area or region. |
| Add Additional Locations | <p>Click to access the Job Opening - Locations page, where you can enter additional locations and recruiting locations.</p> <p>See Chapter 10, "Creating Job Openings," Adding Locations to Job Openings, page 236.</p> |
| Status Code | <p>Displays the current job opening status. Only recruiting administrators can override this field.</p> <p>In general, the system sets the value of this field as the job opening moves through the recruiting process and, if approvals are active, through the approval process.</p> <p>See Chapter 4, "Setting Up Recruiting Statuses," Understanding Recruiting Statuses, page 35.</p> |
| Status Reason | <p>Select a status reason code that is associated with the current status.</p> <p>The system can sets the value of this field as the job opening moves through the recruiting process. If approvals are active, this field is read-only until the job opening is approved.</p> |
| Status Date | Enter the date on which the status went into effect. The default date is the current date. |
| Desired Started Date | <p>Enter the date that the job begins.</p> <p>This field can be used as a parameter for screening applicants.</p> |
| Encumbrance Date (encumbrance date) | <p>If your organization uses the Commitment Accounting business process in PeopleSoft Enterprise Human Resources, indicate how the system budgets for the unfilled position. Select one of these options:</p> <ul style="list-style-type: none"> • <i>Authorization Date</i>: Start budgeting for the position from the date that it is authorized, as indicated in the Date Authorized field. • <i>Project Fill Date</i>: Start budgeting for the position from the date that you expect to fill the position as indicated in Projected Fill Date field. <p>If you're not using commitment accounting, leave this field blank.</p> |
| Projected Fill Date | If you selected <i>Project Fill Date</i> in the Encumbrance Date Indicator field, enter the date that you expect to fill the job opening. |

| | |
|----------------------------|--|
| Date Authorized | The date that the job opening was approved. If approvals are being used, this date is the date the job opening reaches final approval. When you create a job posting, you can set the posting date relative to this date. |
| Referral Program ID | Select an employee referral program. If there is an employee referral program associated with the recruitment template, that employee referral program appears here. |
| Recruitment Contact | Select a recruitment contact. Recruitment contacts are defined on the Recruitment Contacts page and must have a recruitment type of <i>Office</i> . |

(USF) Opening Information: U.S. Federal Page Elements

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

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

The system uses the recruitment type to determine what type of priority to give to applicants with priority placement codes.

See [Chapter 5, "Setting Up Screening Processes," Understanding Priority Placement Processing, page 81.](#)

(USF) Area of Consideration

Defines where the job opening is to be available:

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

(USF) Draft Status

Select the applicant's draft status:

- *Not Applicable*
- *Not Yet Registered*
- *Registered*

(USF) Country

Select the country in which the job opening is to be filled.

(USF) Citizenship Status Select the applicant citizenship status. Select from the following options:

- *Alien Permanent*
- *Alien Temporary*
- *Canadian Citizen*
- *Employment Visa*
- *Native*
- *Naturalized*
- *Not Indicated*
- *Other*
- *Permanent Resident*

This field can be used as a parameter for screening applicants.

(USF) Minimum Age Enter the minimum age restriction that might apply to this job opening.
This field can be used as a parameter for screening applicants.

(USF) Maximum Age Enter the maximum age restriction that might apply to this job opening.
This field can be used as a parameter for screening applicants.

(USF) Gender Enter any gender restriction that might apply to this job opening.
This field can be used as a parameter for screening applicants.

(USF) Candidate Name Requests Click to access the Candidate Name Requests page, where you can enter candidates that you highly recommend for the job opening. This information can be used in resolving ties when screening applicants.

(USF) Priority Placement Considerations

Program Select a priority placement program to associate with this job opening.
The Priority Placement process uses this information, along with salary grade and level for the job opening, to identify any applicants that have an entitlement to priority placement consideration.

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

Employees Being Replaced

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.

Positions

This grid appears only if the Recruiting Installation - Jobs page is configured to allow multiple jobs or positions in a job opening. If this grid appears, there is no Position Number field in the Opening Information group box.

Descr (description) Identify a position that is associated with this job opening.

Primary Position Select this check box to identify the primary position when there are multiple job positions associated with a job opening. You must identify one and only one primary position.

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 9.1 PeopleBook: Manage Labor Administration, "Setting Up Works Councils."

Adding Locations to Job Openings

Access the Job Opening - Locations page (click the Add Additional Locations link on the Job Opening page).

Job Opening

Locations

| *Location | Primary Location | |
|------------------------------|-------------------------------------|--|
| Swish Fnd. North Cal Fed Rec | <input checked="" type="checkbox"/> | |

[+ Add Locations](#)

| *Location | Primary Recruiting Area | Target Openings | |
|-------------------------------|-------------------------------------|---|--|
| Swish Fnd. North Cal Fed Rec | <input checked="" type="checkbox"/> | <input style="width: 40px;" type="text" value="1"/> | |
| Swish Found. Rec Sol West Reg | <input type="checkbox"/> | <input style="width: 40px;" type="text" value="1"/> | |

[+ Add Recruiting Locations](#)

Job Opening - Locations page

Locations

- Location** Select an HR location that identifies where the job opening is physically located.
- Primary Location** If there is more the one location associated with the job opening, indicate which location is primary.
- Add Locations** Click to add another row to the Locations grid.

Recruiting Locations

- Location** Select the recruiting location that appear to applicants when they search for a job.
- Primary Recruiting Area** If there is more the one recruiting location associated with the job opening, indicate which recruiting location is primary.
- Target Openings** Enter the number of target openings for each recruiting location.
- Add Recruiting Locations** Click to add another row to the Recruiting Locations grid.

(USF) Entering Candidate Name Requests

Access the Candidate Name Requests page (click the Candidate Name Request link on the Job Opening page).

Candidate Name Requests page

Name Select the name of a person who you would like to target for this position. This field can be used as a tie breaker in screening.

Working With Multiple Job Codes in a Job Opening

Job openings can have multiple job codes if you use the Recruiting Installation - Jobs page to enable this capability.

This section provides an overview of copying qualifications to non-primary job codes and discusses how to:

- Add additional job codes to a job opening.
- Copy job qualifications to non-primary job codes.

Understanding Copying Qualifications To Non-Primary Job Codes

To expedite data entry in job openings with multiple job codes, the system enables you to copy job qualifications from the primary job code to all other job codes.

The Copy Process

Copy functionality is available for both standard requisitions and continuous job openings.

The copy process copies data to existing non-primary job codes. Any data that already exists for the non-primary job codes is not affected.

For example, if the primary job code includes competencies A, B, and C, and a non-primary job code includes competency X, then after the copy process, the non-primary job code will have four competencies: A, B, C, and X.

If you add additional job codes after copying, the system automatically copies the primary job code qualifications to the newly added job code. In this situation, the system copies the primary job code qualifications as they are at the time the new job code is created, which may be different than the qualifications that were copied at the time of the original copying process.

Copyable Data

The data that is copied includes:

- Work Experience and Education.
- Screening Questions.

The copy process copies the answers (for multiple-choice questions) and evaluators (for open-ended questions) along with the questions themselves.

- Content items from profile-based qualifications.

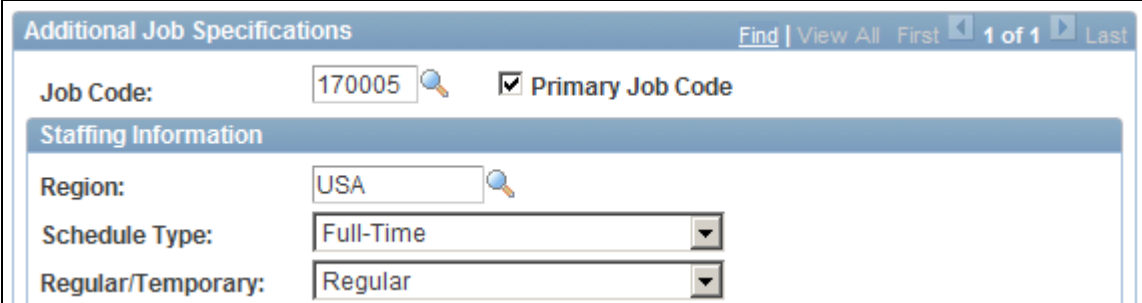
Examples of profile-based qualifications include competencies, degrees, and languages.

Note. There are other data sections (staffing information, salary information, and screening information) that have separate rows for each job code in the job opening, but the copy process does *not* copy data in these sections, and the Copy Qualifications from Primary Job Code button does not appear unless the page shows copyable sections as well.

Adding Additional Job Codes to a Job Opening

Access the Job Opening page (select Recruiting, Create New Job Opening, then click the Continue button on the Enter Primary Job Opening page and, if applicable, on the View Combined Profile Information page).

If Allow Multiple Jobs/Positions is selected on the Recruiting Installation - Jobs page, a job code scroll area appears for those job opening sections where each job code has its own settings.



The screenshot shows a web form titled "Additional Job Specifications". At the top right, there are navigation links: "Find | View All | First | 1 of 1 | Last". Below this, the "Job Code:" field contains "170005" with a magnifying glass icon, and a checkbox labeled "Primary Job Code" is checked. A blue header bar labeled "Staffing Information" is below. Under this header, there are three rows: "Region:" with a text field containing "USA" and a magnifying glass icon; "Schedule Type:" with a dropdown menu showing "Full-Time"; and "Regular/Temporary:" with a dropdown menu showing "Regular".

Scroll area for multiple job codes

These additional page elements appear when multiple job or positions are enabled.

| | |
|-------------------------|--|
| Job Code | <p>When you first create a job opening, the job code (if any) that you entered on the Enter Primary Job Opening Information page appears in this field by default. As you create additional rows for additional job codes, use this field to enter the job codes.</p> <p>When a job opening has multiple job codes, each job code has its own staffing information, salary information, qualifications, and screening configuration.</p> <p>Job postings in Candidate Gateway show only the posting information for the primary job code; applicants cannot tell that there are additional job codes in the job opening.</p> |
| Primary Job Code | <p>Select this check box to identify the primary job code when there are multiple job codes associated with a job opening. You must identify one and only one primary job code.</p> |
| Add Job Codes | <p>Click to add another job code to the job opening.</p> |
| Delete Job Code | <p>Click to delete a job code from the job opening.</p> |

Copying Job Qualifications to Non-Primary Job Codes

Access the Job Opening page (select Recruiting, Create New Job Opening, then click the Continue button on the Enter Primary Job Opening page and, if applicable, on the View Combined Profile Information page).

Access a section that includes copyable qualifications.

To add Tests/Examinations, select the [Add Tests/Examinations](#) hyperlink below. To change information for Tests/Examinations, select the hyperlink under the Tests/Examinations field. Select the delete icon to remove Tests/Examinations information.

| ▼ Tests/Examinations | | |
|--|--|--|
| Find View All First 1-3 of 3 Last | | |
| Profile ID | Tests/Examinations | |
| 100888 | Mechanical Concepts Test | |
| 100885 | General Secretarial Skills | |
| 100885 | General Clerical Skills | |

[+ Add Tests/Examinations](#)

Select the [Add Screening Questions](#) hyperlink to add one question at a time to the Job Opening. Select the [Load from Question Sets](#) hyperlink to add a question set containing one or more questions to the Job Opening. Alternatively select a new question from the prompt or change an existing question by selecting a different question from the prompt. To delete a question, select the delete icon against the question you wish to delete.

| Screening Questions | | | |
|---|--|--------------------------------|------------------------------|
| *Question | | Question Order | Action |
| <input type="text" value="Confidential Mail"/> | | <input type="text" value="1"/> | View Answers |
| <input type="text" value="Employee Input and Development"/> | | <input type="text" value="2"/> | View Answers |
| <input type="text" value="Issue Resolution"/> | | <input type="text" value="3"/> | View Answers |
| <input type="text" value="Workload Management"/> | | <input type="text" value="4"/> | View Answers |
| <input type="text" value="Overtime"/> | | <input type="text" value="5"/> | View Answers |

[+ Add Screening Questions](#) [+ Load from Question Sets](#)

[+ Add Job Codes](#) [- Delete Job Code](#)

[Copy Qualifications from Primary Job Code](#)

The [Copy Qualifications from Primary Job Code](#) button appears only if there are copyable sections on the page

Copy Qualifications from Primary Job Code

Click this button to copy job opening qualifications from the primary job code to all other job codes. Copied information includes work experience and education, screening questions, and any profile-based qualifications.

The copied information is added to any existing data in the other job codes—it does not overwrite or delete anything.

This button appears only on page sections that include copyable data. If there is only one job code in the job opening, the button is visible but not active.

Adding Staffing and Salary Information

This section discusses how to:

- Enter staffing information.
- Enter salary information.



Page Used to Add Salary and Staffing Information

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|------------------|------------------------|--|--|
| Job Opening | HRS_JOB_OPENING | <ul style="list-style-type: none"> • Recruiting, Create New Job Opening Click the Continue button on the Enter Primary Job Opening page and, if necessary, on the View Combined Profile Information page. • Recruiting, Find Job Openings Click the link for a job opening in the search results, then click the Job Details tab. Click the link that corresponds to the type of job opening data you want to access. | Enter job opening data, including salary and staffing information. |

Entering Staffing Information

Access the Job Opening page (select Recruiting, Create New Job Opening, then click the Continue button on the Enter Primary Job Opening page and, if applicable, on the Reviewing Profile Data page).

Locate the Staffing Information section.

| Staffing Information | |
|----------------------|--|
| Region: | <input type="text" value="USA"/>  |
| Schedule Type: | <input type="text" value="Full-Time"/> ▼ |
| Regular/Temporary: | <input type="text" value="Regular"/> ▼ |
| Not To Exceed Date: | <input type="text"/>  |
| Not-to-Exceed Days: | <input type="text"/> |
| Summer Appointment: | <input type="text"/> ▼ |
| Shift: | <input type="text" value="Not Applicable"/> ▼ |
| Hours: | <input type="text" value="40.00"/> |
| Work Period: | <input type="text" value="Weekly"/> ▼ |
| Travel Percentage: | <input type="text" value="None"/> ▼ |
| Supervisor Level: | <input type="text"/> ▼ |
| FLSA Status: | <input type="text"/> ▼ |
| LEO/Fire Position: | <input type="text"/> ▼ |
| Sensitivity Code: | <input type="text"/> ▼ |
| Type of Appointment: | <input type="text"/> ▼ |

Job Opening page: Staffing Information Section

Staffing Information







- Region** Select the region in which the job opening is located. Regions are defined on the Regulatory Region page.
See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Working with Regulatory Regions."
- Schedule Type** Select whether this is a *Full-time* or *Part-Time* position.
This field can be used as a parameter for screening applicants.
- Regular/Temporary** Select whether this is a *Regular* or *Temporary* position.
This field can be used as a parameter for screening applicants.
- Begin Date** Enter the date on which the job is to begin.
- End Date** Enter the date on which the job is scheduled to end. This field is for temporary job openings.
- (USF) Not To Exceed Date** If this is a temporary position, enter the date on which it will end.
- (USF) Not To Exceed Days** If this is a temporary position, enter the maximum number of days after the Not To Exceed Date by which the job can extend.

| | |
|--|--|
| (USF) Summer Appointment | Select this check box if this position is a summer appointment. This information is sent as part of the vacancy information for the USA Jobs program. When there are multiple job codes, the primary job code value for summer appointment is used. |
| Shift | Select the shift for this job opening. This field can be used as a parameter for screening applicants. |
| Hours | Enter the default number of hours in a normal workweek for this job. The field defaults to the number associated with the job code. This field can be used as a parameter for screening applicants. It is compared to the Desired Hours Per Week field on the Application Details page. |
| Work Period | Select the time period in which employees must complete the standard hours. These values are created by using the Frequency table. |
| Travel Percentage | Enter the percent of travel required by this job. This field can be used as a parameter for screening applicants. It is compared to the Travel Percentage field on the Application Details page. |
| (USF) Supervisor Level | Enter the supervisor level. The default value is the level assigned on the job code. |
| (USF) FLSA Status (fair labor standards act status) | Displays the FLSA status associated with the job code. |
| (USF) LEO/Fire Position (law enforcement officer/fire position) | Displays the LEO/Fire position code associated with the job code. |
| (USF) Sensitivity Code | Select a sensitivity code. The default value is the value assigned to the job code. |
| (USF) Type of Appointment | Select the type of administrative post. |

Entering Salary Information

Access the Job Opening page (select Recruiting, Create New Job Opening, then click the Continue button on the Enter Primary Job Opening page and, if applicable, on the Reviewing Profile Data page).

Locate the Salary Information section.

| Salary Information | |
|----------------------|--|
| Pay Plan: | GS |
| From Grade: | <input type="text" value="03"/>  |
| From Step: | <input type="text"/>  |
| To Grade: | <input type="text"/>  |
| To Step: | <input type="text"/>  |
| Salary Range From: | <input type="text" value="21,517.000000"/> (Default From Job Code) |
| Salary Range To: | <input type="text" value="27,970.000000"/> (Default From Job Code) |
| Pay Frequency: | <input type="text" value="Year"/>  |
| Currency: | <input type="text" value="US Dollar"/>  |
| Occupational Series: | 0305 Mail and file |
| PATCOB Code: | Clerical |

| Job Details | Qualifications | Screening | Job Postings | Hiring Team |
|-------------|--------------------------------|---------------------------|------------------------------|-----------------------------|
|-------------|--------------------------------|---------------------------|------------------------------|-----------------------------|

| | | | | |
|--|--|---------------------------------------|-------------------------------|---------------------------|
| <input type="button" value="Save and Open"/> | <input type="button" value="Save as Draft"/> | <input type="button" value="Cancel"/> | Previous Step | Next Step |
|--|--|---------------------------------------|-------------------------------|---------------------------|

Job Opening page: Salary Information Section

Salary Information

- Salary Admin Plan** Displays the salary plan associated with the position. You can change the salary plan by selecting another from the list of available options.
- (USF) Pay Plan** Displays the pay plan associated with the position. You can change the pay plan by selecting another from the list of available options.
- From Grade** The pay grade for the job opening, or, if there is a range of pay grades, the low end of the range. The default value is the pay grade that is associated with the position.
- From Step** The step for the job opening, or, if there is a range of steps, the low end of the range. The default value is the step that is associated with the position.
- To Grade** If the job opening has a range of pay grades, enter the high grade.
- To Step** If the job opening has a range of steps, enter the high step.
- Salary Range From** The system supplies the salary range from the Job Code table. You can override these values.

| | |
|--|---|
| Salary Range To | The system supplies the salary range from the Job Code table. You can override these values. |
| Pay Frequency | Select the pay frequency in which this job is paid. |
| Currency | Select the currency in which this job is paid. |
| (USF) Occupational Series | Displays the occupational series that is associated with this occupational series for this position. |
| (USF) PATCOB Code (Professional, Administrative, Technical, Clerical, Other, Blue Collar code) | Displays the PATCOB code that is associated with occupational series for this position. These codes are occupational categories established by the U.S. Equal Employment Opportunity Commission. PATCOB Code is not a search field for job openings. If you want applicants to be able to search for job openings based on the PATCOB code, you can set up your job families (which are searchable in PeopleSoft Candidate Gateway) to match the PATCOB codes. |

Adding Job Qualifications

This section discusses how to:

- Review profile usage.
- Define education and work experience requirements.
- Define profile-based job qualifications.
- Add details for profile content items.

Pages Used to Define Job Qualifications

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|--------------------|------------------------|--|--|
| Job Opening | HRS_JOB_OPENING | <ul style="list-style-type: none"> Recruiting, Create New Job Opening Click the Continue button on the Enter Primary Job Opening page and, if necessary, on the View Combined Profile Information page. Recruiting, Find Job Openings Click the link for a job opening in the search results, then click the Job Details tab. Click the link that corresponds to the type of job opening data you want to access. | Enter job opening data, including job qualifications such as education and experience, screening questions, and qualifications that have been configured as profile content types. |
| Add <Profile Type> | HRS_PROF_DETAIL | Click the Add <qualification type> link that is associated with a qualification content type. | Enter detailed information about the qualification. The specific page elements that appear depend on the content type. |

Reviewing Profile Usage

Access the Job Opening page (select Recruiting, Create New Job Opening, then click the Continue button on the Enter Primary Job Opening page and, if applicable, on the Reviewing Profile Data page).

Note. The template for the job opening controls whether this section appears and, if so, where it appears. This section is only available for inclusion in the job opening template if the system is configured for full profile integration.

Select **Add a Profile** to add a row to the Profile Combination grid. Select a profile type for the profile you wish to add then choose a Profile ID from the prompt. Once you have selected a profile, items associated to the profile will be imported into the Job Opening. The Update Primary Profile checkbox will be editable for Non-person profiles only. To delete a profile and all items associated to it from the Job Opening, select the delete icon next to the profile you wish to delete.

| Profile Combination | | | | | |
|---------------------|------------|---------------------|-------------------------------------|--------------------------|--|
| *Profile Type | Profile ID | Description | Primary Profile | Update Primary Profile | |
| Person Profi | KU0007 | Betty Locherty | <input type="checkbox"/> | <input type="checkbox"/> | |
| Non-person | 100886 | Analyst - Financial | <input checked="" type="checkbox"/> | <input type="checkbox"/> | |

[+ Add a Profile](#)

Job Opening page: Profile Combination Section

This section displays the profiles whose content items were copied into the job opening. If you remove a profile from this grid, the system removes all items related to that Profile ID from the job opening. If you add an additional profile, the system copies the additional items from that profile into the job opening.

The Description column includes a link that you click to access the profile details; the link is disabled for person profiles when you do not have security access to view that person's profile.

Note. Approvers cannot modify profile data for a job opening. Approvers can change, add, or delete individual content items as necessary, but they may not change, add, or delete profile IDs.

Defining Education and Work Experience Requirements.

Access the Job Opening page (select Recruiting, Create New Job Opening, then click the Continue button on the Enter Primary Job Opening page and, if applicable, on the Reviewing Profile Data page).

Note. The template for the job opening controls whether this section appears and, if so, where it appears.

Indicate the education level and work experience, if any, that are required for this Job Opening. To add Work Experience and Education select the Add Work Experience and Education link.

| Work Experience & Education | | |
|-----------------------------|--------------------------|--|
| *Highest Education Level | Years of Work Experience | |
| Bachelor's Degree | 4.0 | |
| Master's Degree | 2.0 | |

[+ Add Work Experience and Education](#)

Job Opening page: Work Experience and Education section

Work Experience & Education

Use this grid to set up a matrix showing how many years of experience are required for applicants with different education levels.

Highest Education Level Select an education level so that you can then enter the amount of experience required by applicants who have selected the same value as their highest level of education.

Education levels are defined on the Education Level Achieved Table page.

Note. When you use Education & Experience requirements as screening criteria, applicants with a higher education level than the one you selected are *not* considered to have met the requirement. To prevent the system from penalizing applicants with more education than you require, create additional rows for every degree above the minimum requirement.

Years of Work Experience

Enter the years of work experience required for this job opening. Leave this field blank to indicate that there are no experience requirements for applicants who have attained the given education level.

Note. When the screening process evaluates whether an applicant meets particular education & experience requirements, it fails applications where there are no work experience entries with start dates, even if there are zero years of work experience required.

Add Work Experience & Education Click to add another row to the Work Experience & Education grid.

Defining Profile-Based Job Qualifications

Access the Job Opening page (select Recruiting, Create New Job Opening, then click the Continue button on the Enter Primary Job Opening page and, if applicable, on the Reviewing Profile Data page).

Note. The template for the job opening controls which profile-based section appear on the Job Opening page and where they appear.

To add Areas of Study to the Job Opening, select the Add Areas of Study hyperlink below.

Areas of Study

There are no items for the Areas of Study section. Please add one if required.

[+ Add Areas of Study](#)

To add Competencies, select the Add Competencies hyperlink below. To change information for Competencies, select the hyperlink under the Competencies field. Select the delete icon to remove Competencies information.

Competencies Find | View All | First 1-5 of 7 Last

| Profile ID | Competencies | Evaluation Type | Proficiency | |
|------------|--|-------------------|-------------|--|
| KU0026 | Ability to prioritize tasks | Approved/Official | 3-Good | |
| KU0026 | Organize people and goal tasks | Approved/Official | 3-Good | |
| KU0026 | Resource Planning | Approved/Official | 3-Good | |
| KU0026 | Persuasive | Approved/Official | 3-Good | |
| KU0026 | Business Planning | Approved/Official | 3-Good | |

[+ Add Competencies](#)

To add Degrees to the Job Opening, select the Add Degrees hyperlink below.

Degrees Find | View All | First 1 of 1 Last

| Profile ID | Degrees | |
|------------|----------------------------------|--|
| 0 | Bachelor of Arts | |

[+ Add Degrees](#)

Job Opening page: profile-related sections

<Profile Content Type>

The Job Opening page includes a separate grid for each profile content type in the associated job opening template.

Note. The exact configuration of these grids depends on the settings on the Content Section configuration page.

See [Chapter 3, "Setting Up Profile Integration," page 25.](#)

Profile ID

Identifies the profile that provided the content type. For example, if you load Betty Locherty's person profile and the Director of Finance job profile, the Competencies grid can list both Betty's competencies and the job competencies; this field lets you know which profile a specific competency came from.

Note. For person profiles, this field is blank if you do not have security access to see the person's profile data.

If multiple profiles have the same item (for example, an identical competency), and one profile has a version with a later effective date, then the system brings that later version and its Profile ID in the grid for that content type.

If multiple profiles use the latest effective-dated row for the duplicate item, the system populates the Profile ID field with the ID of one of the profiles, though not necessarily the primary profile for the job opening.

Any content items that you add to the job opening are associated with the primary profile, unless there is a profile type configuration incompatibility, in which case the profile ID for the new content item is 0.

<Content Item Name>

Displays the name of the specific content item. For example, in the Competencies grid, this column (labeled *Competencies*) displays names of specific competencies such as *Analytical Thinking* or *Ability to Prioritize Tasks*.

To modify information about a content item that you have already added to the grid, click the content item name to access the corresponding detail page.

<Additional Column Names>

The columns that appear in each grid depend on the settings in the Content Section Configuration page for the content type. Specifically, fields for which you select the Summary check box on the Content Section Configuration page appear as grid columns.

Add <Content Item>

Click this link to access the content item detail page, where you enter specific content items (such as *Analytical Thinking*). The fields on the detail page depend on the content type definition within the Manage Profiles business process.

Save the data on the detail page to add the content item to the grid.

Proficiency Ratings

When content types such as competencies are associated with ratings scales, the content type grid displays a rating. This data is informational only.

When you screen applicants based on competency ratings, the system does not evaluate whether the employee has received the specified rating. Instead, the screening process awards points based on the rating scale that you set up when you define your screening criteria.

Adding Content Item Details

Access the Add <Profile Type> page (click the Add link that is associated with a qualification content type) or the Update <Profile Type> page (click a content item in any content type grid on the Job Opening page)

Add Competencies page

Note. The page name and the fields on the page vary depending on the content type.

Details

The Details group box is a scroll area than you can use to view details for all content items (for the specified content type) that have already been added to the job opening. When you access this page using the Add <Content Type> link, the system displays a new blank row of for you to complete.

- | | |
|------------------------------|---|
| OK | Click to save changes to all rows and return to the Job Opening page. |
| Cancel | Click to return to the Job Opening page without saving any changes to the current row. |
| Apply and Add Another | Click to save all changes to all rows and add another blank row to the Details scroll area. |

Adding Screening Questions to a Job Opening

This section discusses how to:

- Add screening questions to a job opening.
- View answers to multiple-choice screening questions.
- Assign evaluators to open-ended screening questions.
- Load screening questions from question sets.

Pages Used to Add Screening Questions to a Job Opening









| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|--|------------------------|--|---|
| Job Opening page: Screening Questions section | HRS_JOB_OPENING | <ul style="list-style-type: none"> Recruiting, Create New Job Opening <p>Click the Continue button on the Enter Primary Job Opening page and, if necessary, on the View Combined Profile Information page.</p> <ul style="list-style-type: none"> Recruiting, Find Job Openings <p>Click the link for a job opening in the search results, then click the Job Details tab.</p> | Enter screening questions for a job opening. |
| Answers to Screening Questions | HRS_JO_ANSWER_SEC | Click the View Answers link for a multiple-choice screening question in the Screening Questions section of the Job Opening page. | Review the correct and incorrect answers to a multiple-choice screening question, and review the points that are awarded for each answer. |
| Assign Evaluators | HRS_OE_EVAL_SEC | Click the Enter Evaluators link for an open-ended screening question in the Screening Questions section of the Job Opening page. | Review the full text of an open-ended question, and assign evaluators who will give scores to applicants' answers to that question. |
| Select Question Sets | HRS_QSET_ADD_SEC | Click the Load from Question Sets link in the Screening Questions section of the Job Opening page. | Choose a question set so that the system can add all included questions to the job. |

Adding Screening Questions to a Job Opening

Access the Job Opening page: Screening Questions section (select Recruiting, Create New Job Opening, then click the Continue button on the Enter Primary Job Opening page and, if applicable, on the Reviewing Profile Data page).

Note. The template for the job opening controls whether this section appears and, if so, where it appears.

Select the Add Screening Questions hyperlink to add one question at a time to the Job Opening. Select the Load from Question Sets hyperlink to add a question set containing one or more questions to the Job Opening. Alternatively select a new question from the prompt or change an existing question by selecting a different question from the prompt. To delete a question, select the delete icon against the question you wish to delete.

| Screening Questions | | | |
|--|----------------|----------------------------------|---|
| *Question | Question Order | Action | |
| 21 Yrs  | 1 | View Answers |  |
| Eligible to possess a firearm?  | 2 | View Answers |  |
| Overtime  | 3 | View Answers |  |
| disclose pre-background check  | | Enter Evaluators |  |

[+ Add Screening Questions](#) [+ Load from Question Sets](#)

Job Opening page: Screening Questions section

Note. If there are prescreening questions in the resume template for the job opening, or if there is a default question set in the job opening template for the job opening, the system adds those questions to this grid when you first create the job opening. If you change the template association, the questions are not removed, though additional questions may be added.

Screening Questions

Question

Select a screening question. Screening questions are defined on the Question Definition page.

Questions that you enter here are available to be used by any of the screening levels that you run for this job opening (except that you can't use open-ended questions for prescreening or online screening). Applicant's answers are collected during the online application process in Candidate Gateway.

Question Order

Enter numbers to control the order that the questions appear in the online application. If you load questions from a question set that specified order numbers, then those order numbers are the default values in the job opening.

Review any default values carefully. Default values might not be unique, depending on the order numbers that were assigned in the question set definitions, and it is up to you to specify an unambiguous question order.

Because this field accepts only integers, consider using non-consecutive numbers to make it easier to insert additional questions between existing questions.

Regardless of the order numbers you assign, open-ended questions always appear at the end of the questionnaire, after all multiple-choice questions.

Note. If the Randomize Screening Questions field on the Recruiting Installation - Jobs page has a *Yes* value, then the system disregards the question order and presents questions to applicants in random order. Open-ended questions still appear after multiple-choice questions.

Action

For multiple-choice questions, a View Answers link appears. Click this link to access the Answers to Screening Questions page, where you can review the answer choices and their default point values. When you set up screening criteria for the job opening, you can override the default values.

For open-ended questions, an Enter Evaluators link appears. Click this link to access the Assign Evaluators page, where you identify the users who will evaluate and award points to applicants' answers. An evaluator can be any person in the PeopleSoft Human Resources system who has appropriate security access. It is possible to assign yourself as an evaluator.

When evaluating open-ended questions, evaluators see only the question and the answer; no applicant information is visible.

Note. Always assign evaluators to open-ended questions. Only the assigned evaluators can award an applicant points for the question, so questions without evaluators are never awarded any points during screening

See [Chapter 13, "Screening and Routing Applicants," Evaluating Answers to Open-Ended Screening Questions, page 380.](#)

Add Screening Questions

Click to add another row to the Screening Questions grid.

Load from Question Sets

Click to access the Select Question Sets page, where you can select one or more question sets whose questions will all be added to the list of screening questions.

See Also

[Chapter 5, "Setting Up Screening Processes," Setting Up Screening Questions, page 61](#)

Viewing Answers to Multiple-Choice Screening Questions

Access the Answers to Screening Questions page (click the View Answers link for a multiple-choice screening question in the Screening Questions section of the Job Opening page).

Answers to Screening Questions

Question:
Are you 21 years of age or older?

| Answers | | |
|--------------------|----------------|-------------------------------------|
| Answer Description | Default Points | Correct Answer |
| Yes | 10 | <input checked="" type="checkbox"/> |
| No | 0 | <input type="checkbox"/> |

Answers to Screening Questions page

Use this page to review answer information, including default point values for each answer.

To change the list of answers, the default points for an answer, or whether an answer is considered correct, use the Question Definition page.

To change the point values for answers for a particular job opening, use the screening pages in the job opening.

See [Chapter 10, "Creating Job Openings," Defining Screening Points, page 277.](#)

Assigning Evaluators to Open-Ended Screening Questions

Access the Assign Evaluators page (click the Enter Evaluators link for an open-ended screening question in the Screening Questions section of the Job Opening page).

Assign Evaluators

Question:
What is your opinion of the way in which an organization can leverage efficient administration practices to engage in greater social responsibility? Please answer in paragraph format using no more than 100 words.

| Evaluators for Open Ended Questions | | | |
|-------------------------------------|---------------|----------------------------------|--|
| Empl ID | Name | | |
| <input type="text" value="KU0001"/> | Douglas Lewis | <input type="button" value="+"/> | |
| <input type="text" value="KU0003"/> | Jean Parsons | <input type="button" value="+"/> | |

Assign Evaluators page

EmplID Enter the Employee ID of the users who you want to evaluate applicants' responses to this open-ended question.

Delete If you remove an evaluator from this page, the evaluator's completed evaluations are *not* affected. Only pending evaluations (which appear in the Recruiter Alerts pagelet) are removed.

Loading Screening Questions from Question Sets

Access the Select Question Sets page (click the Load from Question Sets link in the Screening Questions section of the Job Opening page).

Select Question Sets

| Select | Question Set ID | Description |
|--------------------------|-----------------|--------------------------------|
| <input type="checkbox"/> | 1008 | Variety of questions |
| <input type="checkbox"/> | 1009 | 3 General Knowledge Questions |
| <input type="checkbox"/> | 1011 | Seasons |
| <input type="checkbox"/> | 1012 | Basic Eligibility - 0025 |
| <input type="checkbox"/> | 1013 | Customer Focus |
| <input type="checkbox"/> | 1014 | Overtime |
| <input type="checkbox"/> | 1015 | Bedding |
| <input type="checkbox"/> | 1016 | Cooking techniques |
| <input type="checkbox"/> | 1017 | Customer Response |
| <input type="checkbox"/> | 1018 | Food Question Set |
| <input type="checkbox"/> | 1019 | Fed eRecruit Personnel Questns |
| <input type="checkbox"/> | 1020 | General SCR with Open Ended Q |
| <input type="checkbox"/> | 1021 | Ethics And Integrity |
| <input type="checkbox"/> | 1022 | Quick Personality Review |
| <input type="checkbox"/> | 1023 | Health Self Certification |

Select Question Sets page

The Question Set grid lists all questions sets in the system. Select one or more whose questions you want to add to the job opening, then click the OK button.

Setting Up Screening for a Job Opening

This section provides overviews of screening settings in the job opening and of U.S. federal screening setup, and discusses how to:

- Define job opening screening levels.
- Choose screening levels to add.
- Define screening level rules and criteria.
- Define screening points.

Understanding Screening Settings in the Job Opening

Screening is the process used by recruiters to evaluate a list of potential candidates and narrow the list to a few qualified applicants that can be interviewed or hired. A job opening can have multiple screening processes, or screening *levels*, and each screening level can evaluate different criteria and use different processing rules.

Screening Level Selection

The Screening Options section on the Job Opening page includes a grid containing an ordered list of screening levels for the job. This section also includes a check box that you use to indicate whether applicants must pass the previous screening level before being included in subsequent screening levels.

If you include a screening level for prescreening, it is always the first screening level. If you include a screening level for online screening, it always goes before any other screening levels except the prescreening screening level.

See [Chapter 5, "Setting Up Screening Processes," Understanding Prescreening and Online Screening, page 75](#)

±

Screening Criteria Selection

The screening level definitions that you reference from the job opening include default processing rules, but they do not include any actual screening criteria. Use the Job Opening Screening Criteria page to select job opening-specific criteria for each level.

When you access the Job Opening Screening Criteria page for a screening level, the grid where you select screening criteria is automatically populated with certain attributes of the job opening. You then select which of the available items to use in the screening level that you are configuring.

The job opening attributes that are available for use as screening criteria fall into four groups:

- *General requirements* come from fields that you populate in the Job Information and Salary Information sections of the Job Opening page.

Fields where you do not enter data do not appear in the list of available screening criteria.

General requirements come from these job opening attributes: regular/temporary, full-time/part-time, start date, standard hours, shift, travel percent, minimum and maximum age, sex, citizenship status, recruiting location, minimum salary, and minimum grade.

- *Education and experience* requirements come from the Education and Experience section of the Job Opening page.

These requirements indicate the number of years of experience required for applicants with various levels of education. Each set of values—a degree and the years of experience required of applicants with that degree—is processed separately. To prevent the system from penalizing someone with the correct amount of experience but a higher degree, the job opening should include rows for every degree above the minimum requirement. To indicate that any amount of experience is acceptable for applicants with a given degree, enter 0 as the experience requirement for that degree.

Note. When the screening process evaluates whether an applicant meets particular education & experience requirements, it fails applications where there are no work experience entries with start dates, even if there are zero years of work experience required.

- *Screening questions* are created outside of the job opening and then added to the Screening Questions section of the Job Opening page.

Screening questions enable you to ask multiple-choice or open-ended questions to applicants who apply online. Open-ended questions must be associated with one or more evaluators who can judge the applicant's answer and award points.

Note. Unlike the other types of screening criteria, screening questions are useful only if applicants can submit applications online. It is not possible to enter answers to screening questions in the Application Details page.

- *Profile content types* are job opening attributes whose properties are configured in the Manage Profiles module in PeopleSoft Human Resources and then configured for use in Talent Acquisition Manager.

For example, Oracle delivers content types for competencies and language skills. If a job opening includes sections for these content types (which depends on the job opening template that is associated with the job opening), then any values that a recruiter enters in these sections (specific competencies and specific language skills) are included in the criteria list on the Job Opening Screening Criteria page.

Profile content types must be explicitly configured for use in screening.

See [Chapter 3, "Setting Up Profile Integration," Configuring Profiles for Recruiting, page 28](#).

The following table lists general requirements that can be used for screening and shows the corresponding applicant data fields:

| Job Opening Field | Applicant Field |
|--------------------------|-------------------------|
| Citizenship Status | Are you a U.S. Citizen? |
| Gender | Gender |

| Job Opening Field | Applicant Field |
|--------------------------|------------------------------------|
| 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 |
| RS Location | First Choice Second Choice |
| Start Date | Desired Start Date |
| Standard Hours/Week | Desired Hour Per Week |
| Travel Percentage | Willing to Travel |

Screening Criteria Point Values

When you define the job-specific criteria for a screening level, you must also provide a point value for each item that you select. The criteria grid includes a points field that displays the maximum point value for each item. Points can be positive or negative.

You assign point values differently depending on the type of criteria:

- For criteria that is either met or not met, the points field is editable so you can directly enter a point value.

Use this method of assigning point values for all general requirements, all education and experience requirements, and certain content types such as licenses that an applicant either has or does not have.

For example, if there is a general requirement that the applicant be at least 18 years old, the applicant either does or doesn't meet the requirement. Therefore, you can enter the point value for this requirement directly on the Job Opening Screening Criteria page.

- For content types that are associated with rating scales (such as competencies), click a link to access a page that lists the possible ratings, and enter the point value for each rating.

Default point values come from the content type definition, but you can override these defaults.

Applicant receive the points that correspond to their rating (as long as the rating type for the applicant's rating matches the required rating type). Unrated applicants receive no points, so it is important that applicants be rated before you run a screening level that evaluates a competency or other qualification with a rating scale.

- For multiple-choice screening questions, click a link to access a page that lists the possible answers, and enter the point value for each answer.

Default point values come from the question definition. You can assign point values to both correct and incorrect questions. If there multiple correct answers, the total value of the question is the sum of the point values of all correct answers.

Applicants receive the points that correspond to the answer or answers that they provided. They receive no points for unanswered questions.

- For open-ended screening questions, click a link to access a page where you enter the maximum point value.

The default maximum point value comes from the question definition.

Applicants receive the average score from all evaluators. If some, but not all, evaluators have entered points for the answer, only the completed evaluations are considered. Applicants receive no points for unevaluated questions.

Screening Level Processing Rules

The Job Opening Screening Criteria page also includes fields that you use to:

- Indicate the percent of the total available points that an applicant needs to earn to pass the screening level.
- Assign dispositions to screened applicants.
- Assign overall screening level scores to screened applicants.
- Send letters to rejected applicants.

Letters can either be sent through email when the rejected disposition is applied, or letters can be generated and printed in batch.

These settings are all identical to the corresponding fields in the screening level definition, and, in fact, are populated based on the default values in the screening level definition. You can override these defaults as needed.

See [Chapter 5, "Setting Up Screening Processes," Understanding Screening Levels, page 72.](#)

(USF) Understanding U.S. Federal Screening Setup

This overview discusses the U.S. federal screening process and the screening configuration options that Talent Acquisition Manager provides to support this process.

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

Federal Screening and Ranking

U.S. government agencies follow a defined screening and ranking process to produce a ranked list of eligible candidates for a job opening. Applicants are ranked according to the manual classification of screening scores as qualified, well qualified, or best qualified along with factors such a veteran's preference and the use of tie breaker functionality.

Applicants typically earn points in three stages:

1. An initial screening level that you configure to be worth a fixed amount of points to applicants who pass.
2. A second screening level that you set up to use a process known as *transmutation*, which converts the raw score based on a transmutation portion that you define.

For example, if you configure the first screening level to be worth 70 points, and you need the total for both screening levels to be on a scale that goes to 100, then you would use 30 as your transmutation portion. The system would then convert the applicant's raw points for the transmuted screening level to a scale that goes up to 30.

There is a configuration option that you use to determine whether to use an hourly or salaried transmutation process for a particular screening level in a job opening.

3. Veterans preference points that are added to the final screening score.

See [Chapter 5, "Setting Up Screening Processes," \(USF\) Setting Up Veterans Preference Codes, page 85.](#)

Salaried Transmutation Calculation

The salaried transmutation process calculates the percentage of the total possible raw points that the applicant received for the screening level and then applies that percentage to the total possible points (the transmutation segment that you specify) to calculate the applicant's score for the screening level.

For example, Brian Waters is being screened using salaried transmutation and a transmutation segment of 30. His raw score is 15 out of a possible 20 points, or 75% of the possible points for the screening level. He therefore receives 75% of 30, or 22.5 as his score for this screening level. Because scores are always whole numbers, Brian's total is rounded up to 23 points.

Hourly Transmutation Calculation

The hourly transmutation process calculates the score somewhat differently because of a requirement that the applicant receive at least half of the available points. It is typically used when the criteria in the first and second screening levels are identical, and the first screening level is configured to award points if the applicant achieves half of the total possible points. That is, if an applicant achieved 18 points out of a possible 20 points to pass the first screening level, then there are 18 - 10, or 8 points left to be transmuted in the second level.

The hourly transmutation calculation determines what percent of the transmutation segment to award using the ratio of (the applicants points above the 50% threshold) to (the total available points above the 50% threshold).

For example, Mary Stone is being screened using hourly transmutation and a transmutation segment of 30. Her raw score is 15 out of a possible 20 points.

Rather than determining the ratio of 15 (earned) to 20 (possible) points, the system first subtracts half of the available points, or 10, from both numbers — those ten points should have been accounted for in the preceding screening level. The result is that the system performs the transmutation based on these adjusted numbers: 5 earned points and 10 possible points.

Because Mary's adjusted earned points are half of the adjusted available points, her final score for the screening level is half of 30, or 15.

Rules for Ranking Applicants

At the end of the applicant screening process, applicants' cumulative screening scores are adjusted for veterans preference to produce a final score. Next, you qualify the applications by manually entering score thresholds and applying those thresholds to classify applicants as qualified, well-qualified, or best-qualified based on their scores.

Note. Applicants cannot be ranked unless the manual process of qualifying them has been completed.

The system then considers these qualification classifications along with the applicants's priority processing status and places applicants in these four categories:

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

Rules that you configure for each job opening control which categories of applicants are included in the final ranking. The rules enable you to include different categories for competitive applicants and noncompetitive applicants.

You can also choose whether veterans receive preference in tie-breakers.

Prerequisites

Before you configure screening for a job opening, you must set up the screening level definitions that you will use, and you must enter data in all of the job opening fields that you intend to use as screening criteria.

If you want the system to place a default set of screening levels in newly created job openings, you can associate screening levels to screening template and screening templates to recruitment templates. However, this task is optional.

Pages Used to Set Up Screening for a Job Opening

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|-------------------------------------|------------------------|--|---|
| Job Opening page: Screening section | HRS_JOB_OPENING | <ul style="list-style-type: none"> Recruiting, Create New Job Opening Click the Continue button on the Enter Primary Job Opening page and, if necessary, on the View Combined Profile Information page. Recruiting, Find Job Openings Click the link for a job opening in the search results, then click the Job Details tab. Click the link that corresponds to the type of job opening data you want to access. | Enter screening options for a job opening. |
| Add Screening Levels | HRS_SCR_ADD_SEC | Click the Add Screening Options link on the Job Opening page. | Add screening levels to the job opening. |
| Job Opening Screening Criteria | HRS_JO_SCR_DTL | Click the screening level link in the Applicant Screening grid on the Job Opening page. | Add screening criteria to screening levels. |
| View Text ID Text Message | HRS_JO_SCR_VW_SEC | Click any of the View <type of> Message links on the Job Opening Screening Criteria page. | View the complete text of a message that you selected to use as an explanatory message, a pass message, or a fail message for prescreening or online screening. |
| Define Screening Points | HRS_JO_SCR_RTG_SEC | In the Screening Requirements group box in the Job Opening Screening Criteria page, click the Edit Details link for an item that is associated with a rating scale. | Review and override points for ratings on a rating scale or answers to a multiple-choice question. Review and override the maximum point value of open-ended questions. |

Defining Job Opening Screening Levels

Access the Job Opening page (select Recruiting, Create New Job Opening, then click the Continue button on the Enter Primary Job Opening page and, if applicable, on the Reviewing Profile Data page).

Note. The template for the job opening controls whether this section appears and, if so, where it appears.





Select the Add Screening Options hyperlink to add screening levels to this Job Opening. Select the hyperlink for a particular screening level to further refine that level's screening requirements.

Applicant Screening

Job Code: NF0031 Supervisory Personnel Managemen

Max Total Points: **Must Pass Previous Levels**

Applicant Screening

| Sequence | Screening Levels | | |
|----------|----------------------------------|--|---|
| 1 | Pre Screening | |  |
| 2 | Online Screening | |  |
| 3 | Preliminary | |  |
| 4 | Final | |  |

[+ Add Screening Options](#)

Job Opening page: Screening tab

The following illustration shows how the screening section looks in a federal implementation:

Select the Add Screening Options hyperlink to add screening levels to this Job Opening. Select the hyperlink for a particular screening level to further refine that level's screening requirements.

Applicant Screening

Job Code: 140040 Analyst-Financial Sr

Max Total Points: Must Pass Previous Levels

▼ Federal

Raw Augmented Score Limit: Tie Break Number:

Raw Veterans Pref Score Limit:

Competitive

Rank Candidates of Category 1 Rank Candidates of Category 2

Rank Candidates of Category 3 Rank Candidates of Category 4

Veteran Preferred in Tie Break

Non-competitive

Rank Candidates of Category 1 Rank Candidates of Category 2

Rank Candidates of Category 3 Rank Candidates of Category 4

Veteran Preferred in Tie Break

| Sequence | Screening Levels | Transmutation USF | |
|----------|--|-------------------------------------|--|
| 1 | Minimum Qualifications | <input type="checkbox"/> | |
| 2 | Quality Ranking | <input checked="" type="checkbox"/> | |

[+ Add Screening Options](#)

Screening section in a U.S. federal implementation

Note. In the screening section on the Job Opening page, all fields except for the Transmutation USF check box (visible only in U.S. federal implementations) have default values that come from the screening template.

Max Total Points

Enter the maximum points that an applicant can accumulate across all screening levels. During the applicant ranking process in U.S. federal implementations, the Rank Applicants page shows applicants' final scores both as numbers and as a percentage of the value you enter here, which is typically 100.

Must Pass Previous Levels

Select this check box if the applicant must pass the previous screening level before being evaluated for the next screening level. This does not apply to:

- The first screening level, as indicated by the lowest sequence number.
- Prescreening or online screening levels.

Prescreening is always the first screening level anyway. Online screening can be preceded by prescreening (although the best practice is to use only one or the other in a job opening), but because failing prescreening stops the online application process, applicants cannot even reach the online screening phase without passing any preliminary prescreening.

(USF) Federal

These fields are identical to the corresponding fields in the screening template.

Raw Augmented Score Limit Enter the total number of augmentation points that can be awarded. You can configure screening to award augmentation points for certain competencies or accomplishments that are not required for the position but may be given consideration in the selection process.

Raw Veterans Pref Score Limit (raw veterans preference score limit) Enter the maximum number of points that can be added to an applicant's final screening score for veterans preference. The number that you enter overrides veterans preference score higher than the limit.

Tie Break Number Enter a random number to use in the tie-breaking algorithm for ranking applicants.

(USF) Competitive and Non-Competitive

These fields are identical to the corresponding fields in the screening template.

The same fields appear in the Competitive and Non-Competitive group boxes so that you can separately configure ranking options for competitive and noncompetitive applicants.

Rank Candidates of Category 1, Rank Candidates of Category 2, Rank Candidates of Category 3, and Rank Candidates of Category 4

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

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

Select check boxes for each category of applicants that are to be included in the final applicant ranking that produces the Certificate of Eligibles.

See [Chapter 5, "Setting Up Screening Processes," Understanding Priority Placement Processing, page 81.](#)

Veteran Preferred in Tie Break

Select this check box if you want applicants with veteran status to win tiebreakers during the ranking process.

Applicant Screening

This grid lists the screening levels for the job opening.

Sequence

The sequence determines the order in which you run the listed screening levels. The screening template that provides the default list of screening levels also sets their default sequence.

You cannot change the sequence directly. However, screening levels that you add to the list are automatically put at the end of the sequence. So to change the order of the default screening levels, you can remove screening levels from the list and re-add them in the desired order.

Regardless of how screening levels are added to the list, the sequences starts with the prescreening level (if any), followed by the online screening level (if any), followed by all other screening levels.

Screening Levels

Displays the name of the screening level.

Standard screening levels can appear in the list multiple times. However, the list can include a maximum of one prescreening level and one online screening level.

Click the link to access the Job Opening Screening Criteria page so that you can choose screening criteria and, if necessary, override default processing rules.

Note. After you click a screening level, the system saves the job opening before displaying the Job Opening Screening Criteria page.

Transmutation USF

Select this check box for the screening level where transmutation is applied during U.S. federal screening. This is the second of the two levels whose scores are combined to produce a cumulative score of up to 100 points.

When you select this check box, the system validates that the preceding screening level does not use transmutation, but you must verify that all screening levels are set up correctly.

Note. A transmutation screening level is always preceded by a non-transmutation screening level.

When you select this check box, you must enter additional transmutation information in the Job Opening Screening Criteria page.

See [Chapter 10, "Creating Job Openings," \(USF\) Understanding U.S. Federal Screening Setup, page 261.](#)

Choosing Screening Levels to Add

Access the Add Screening Levels page (click the Add Screening Options link in the screening options section on the Job Opening page).

Add Screening Levels

| Add Screening Options | | |
|--------------------------|--------------|------------------------|
| Select | Screening ID | Description |
| <input type="checkbox"/> | 3 | Basic |
| <input type="checkbox"/> | 4 | Min Quals |
| <input type="checkbox"/> | 6 | Ranking |
| <input type="checkbox"/> | 1000 | Basic Screening |
| <input type="checkbox"/> | 1001 | Basic Eligibility |
| <input type="checkbox"/> | 1002 | Minimum Qualifications |
| <input type="checkbox"/> | 1003 | Quality Ranking |
| <input type="checkbox"/> | 1004 | Preliminary |
| <input type="checkbox"/> | 1005 | Final |
| <input type="checkbox"/> | 1012 | Pre Screening |
| <input type="checkbox"/> | 1013 | Online Screening |

OK
Cancel

Add Screening Levels page

The page lists the screening levels that your organization has defined. Select the check box next to the screening levels that you want to add, then click the OK button.


Note. A job opening can have only one prescreening level and only one online screening level.

Defining Screening Level Rules and Criteria

Access the Job Opening Screening Criteria page (click the screening level link in the Applicant Screening group box on the Job Opening page).

Job Opening

Job Opening Screening Criteria

 [Print Job Opening](#)

| | | | |
|---------------------|------------------------------------|-----------------|----------|
| Posting Title: | Supervisory Personnel Managem | Job Opening ID: | 900001 |
| Job Opening Status: | 010 Open | Job Type: | Standard |
| Position Number: | | | |
| Business Unit: | NFSBU Federal Recruiting Solutions | | |
| Job Family: | | | |

Screening Option Description

Name: Final 1005

Pass Status:

Pass Reason:

Fail Status:

Fail Reason:

Letter:

Hourly Transmutation

Send Letter as Email When Results Are Applied

Scoring Definition

Assign Points

Percent Needed to Pass: Use Raw Points

Maximum Points to Assign:

Points Assigned for Pass: Transmutation Segment:

Points Assigned for Fail:

Manually Assign Status

Job Opening Screening Criteria page (1 of 3)

| Screening Requirements | | | | | | | | |
|------------------------|--|-------------|------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|--------|
| Description | Item | Description | Edit Details | Use in Screening | Required | Augment | Selective | Points |
| General Requirement | Regular / Temp : Regular | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 1 |
| General Requirement | Full / Part Time : Full-Time | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 1 |
| General Requirement | Desired Start Date : 2009-08-25 | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 0 |
| General Requirement | Travel Percent : None | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 0 |
| General Requirement | Minimum Salary : 4000 - Month | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 0 |
| General Requirement | RS Location : 22 | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 0 |
| Education & Experience | Education: Bachelor's Degree, 4 Years of | | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 3 |
| Screening Question | Question: Employee Input and Development | | Edit Details | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 2 |
| Screening Question | Question: Open Ended - General | | Open Ended | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 4 |

Job Opening Screening Criteria page (2 of 3)

| | | | | | | | | |
|--------------------------------|--------------------------------|---------------------------------|------------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|-----------|
| Competencies | Accountability for decisions | Approved/Official - Proficiency | Edit Details | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 5 |
| Competencies | Communication Skills | Self - Proficiency | Edit Details | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 0 |
| Degrees | Bachelor of Arts | Degree | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 0 |
| Language Skills | English | Able To Translate | Edit Details | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 0 |
| Language Skills | English | Reading Proficiency | Edit Details | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 0 |
| Language Skills | English | Speaking Proficiency | Edit Details | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 0 |
| Language Skills | English | Writing Proficiency | Edit Details | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 3 |
| Language Skills | English | Native Language | Edit Details | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 0 |
| Language Skills | English | Language | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 0 |
| Language Skills | English | Able To Teach | Edit Details | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 0 |
| Licenses & Certifications | Personnel Management Associatn | License | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 1 |
| Total Screening Points: | | | | | | | | 20 |

Job Opening Screening Criteria page (3 of 3)

Note. If you have identified members of a screening team for this job opening, these people receive notifications whenever there is a change to the screening criteria.

Screening Option Description: Page Elements for All Screening Levels

Use the fields in this group box to define the rules for processing applicant statuses and rejection letters or email after screening results are applied. The default value come from the screening level definition.

Pass Status and Pass Reason Select the disposition (and, optionally, an associated reason) for the system to assign applicants who pass this screening level. Typically, you assign the *Screen* disposition.

Fail Status and Fail Reason Select the disposition (and, optionally, an associated reason) for the system to assign applicants who fail this screening level. Typically, you assign the *Reject* disposition.

Screening Option Description: Page Elements for Standard Screening Levels

These page elements appear only for standard screening levels (levels that are not for prescreening or online screening).

Letter Select a letter to send to applicants who fail this screening level. The letter is added to the queue for the Generate Recruitment Letter (HRSLETTER) process after screening results are applied.

The drop-down list box includes all of the letters in the HRS_APP_LET report definition, which includes letters for various purposes. Take care to select the appropriate letter. The sample rejection letter that Oracle delivers is HRS_APP_LETTER_IR.

See [Chapter 19, "Managing Applicants," Generating Batch Recruitment Letters, page 602.](#)

Send Letter as Email When Results are Applied Select this check box to have the system send rejected applicants an email with the text of the selected rejection letter. The system sends the email (and creates a contact note) after the results for the screening level are applied. If you choose to send the letter as email, the letter is not added to (or is removed from) the queue for the Generate Recruitment Letter process.

Only applicants who have provided an email address can receive their rejection letter through email.

(USF) Hourly Transmutation If the screening level uses transmutation to calculate applicants' scores (that is, if you selected the Transmutation USF check box in the grid that lists all screening levels for the job opening), select this check box to use hourly transmutation rules. Leave the check box deselected to use salaried transmutation rules.

See [Chapter 10, "Creating Job Openings," Salaried Transmutation Calculation, page 262](#) and [Chapter 10, "Creating Job Openings," Hourly Transmutation Calculation, page 262.](#)

Screening Option Description: Page Elements for Prescreening and Online Screening

These page elements appear only for screening levels for prescreening and online screening.

| Screening Option Description | | | |
|---|----------------------|--|---|
| Name: | Pre Screening | 1012 | |
| Pass Status: | <input type="text"/> | Explain Text ID: | <input type="text"/> View Explanatory Message |
| Pass Reason: | <input type="text"/> | Pass Text ID: | <input type="text"/> View Pass Message |
| Fail Status: | <input type="text"/> | Fail Text ID: | <input type="text"/> View Fail Message |
| Fail Reason: | <input type="text"/> | <input type="checkbox"/> Pass Email Flag | <input type="checkbox"/> Fail Email Flag |
| <input type="checkbox"/> Hourly Transmutation | | | |

Screening Option Description section for online screening and prescreening

Explain Text ID

Select the ID for the message that Candidate Gateway presents to applicants when they reach the point where this screening level is to be processed. Use this message to give the applicant instructions or other relevant information.

Pass Text ID and Fail Text ID

Select the IDs for the messages that Candidate Gateway presents to applicants who pass and who fail this screening level. If neither check box is selected, leave these fields blank.

Messages are required for prescreening and optional for online screening.

Default values come from the screening level definition.

View Explanatory Message, View Pass Message, and View Fail Message

Click these links to access the View Text ID Text Message page, where you can review the complete test of the selected message.

Pass Email Flag and Fail Email Flag

Select these check boxes to make the system send screening applicants an email containing the pass message or fail message, depending on the screening results. The system sends the email in addition to displaying the message online.

Scoring Definition and Assign Points

Use the fields in this group box to define the rules for how screening levels will be scored. The default values come from the screening level definition.

See [Chapter 5, "Setting Up Screening Processes," Setting Up Screening Level Definitions, page 78.](#)

Percent Needed to Pass

Enter the minimum percentage amount of the total possible points that an applicant must have to pass the screening level. If the applicant must correctly answer all prescreening questions, enter 100%.

For U.S. Federal salaried screening, the first screening level requires applicants to achieve 100% to pass.

For U.S. Federal hourly screening, the first screening level requires applicants to achieve 50% to pass.

For both types of U.S. Federal screening, you can leave these fields blank for the second screening level, which uses transmutation to calculate a score.

- Use Raw Points** Select this check box if you want scores for the screening level to be the sum of the actual points that the applicant earned for the screening level. When this check box is selected, transmutation is not available.

If you select this check box, do not enter values in the Maximum Points to Assign, Points Assigned for Pass, or Points Assigned for Fail fields.
- Maximum Points to Assign** Use this field to optionally enter a maximum number of points to assign.
- Points Assigned for Pass and Points Assigned for Fail** Enter scores to assign to all applicants who pass or fail this screening level. If you leave this field blank, the system enters 0. You can enter negative points.
- Manually Assign Status** Select this check box to allow recruiters to manually set an applicant's the pass/fail status for a screening level. Recruiters can set this status with or without running the screening process, which will still calculate the applicant's score and set an initial pass/fail status if it runs.

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

Screening Requirements

This grid displays all available screening criteria so that you can select which items to use in the screening level.

See [Chapter 10, "Creating Job Openings," Understanding Screening Settings in the Job Opening, page 258](#) and [Chapter 5, "Setting Up Screening Processes," Making Content Types Available for Screening, page 69](#).

- Description** (first column) Displays the type of screening criteria. *General Requirements* items appear first, then *Education & Experience* items, then *Screening Question* items.

The remaining items in the grid are job opening attributes based on profile content types. This includes job qualifications such as *Competencies*, *Degrees*, and *Language Skills*. The content type definition provides the descriptive text that appears in this column.

Item and Description

Displays the specific job requirement that is available for screening.

For general requirements, screening questions, and education & experience requirements, text in the Item column concatenates the name of the requirement (for example, Full/Part Time) and the value to be matched (for example, Full-Time). The adjacent Description column is blank.

For content type items, the text in the Item column is simply the name of the content item as defined in the Manage Profiles content catalog. For example, if the content type is *Memberships*, the Item column identifies the membership. The next column displays the specific property, such as *Membership*, that is evaluated during screening.

Note. Settings on the Content Section Configuration page control the profile data that is available for screening.

See [Chapter 5, "Setting Up Screening Processes," Making Content Types Available for Screening, page 69.](#)

If the content types uses instance qualifiers to organize content items, the instance qualifier also appears in the Description column. In particular, competencies use the evaluation type (Self, Supervisor/Manager, Peer, and so forth) as instance qualifiers, and therefore the evaluation type appears next to the property name (Proficiency) in the Description column.

When setting up screening criteria, you might need rows for more than one evaluation type. For example, external applicants can be screened based on their self-determined proficiency ratings, while internal applicants might be screened based on official competency ratings.

See [Chapter 10, "Creating Job Openings," Competency Evaluation Types in Job Openings, page 214.](#)

Edit Details

Displays a link that varies depending on context:

The link text is *Edit Details* for content types such as competencies that provide a rating scale and for multiple-choice questions. Click the link to access the Define Screening Points page, where you can assign different scores to different ratings or question answers.

The link text is *Open Ended* for open-ended questions. Clicking this link also opens the Define Screening Points page, but in this mode, the page displays the text of the open-ended question and enables you to override the default maximum point value for the question.

This column is blank for other types of qualifications.

Use in Screening

Select this check box if you want the screening process to evaluate whether applicants meet the criteria for this item.

| | |
|-------------------------------|--|
| Required | <p>Select this check box if the applicant must have this criteria to pass the screening level. If the system determines that the applicant does not have this criteria (or incorrectly answers this question), the applicant fails the screening level even if the overall point total meets the passing threshold.</p> <p>Online screening, including prescreening, applies this requirement instantly; there is no opportunity for a human to review screening results before applying them. For these screening levels, then, selecting this check box for a question makes it into an immediate disqualification question.</p> |
| (USF) Augment | <p>Select this check box if the points for this criteria are considered augmentation points. The points associated with the screening requirement are shown in the Augmentation Points category on the Screening Details page</p> <p>For example, if you award 10 points for full time, 10 points for regular, and you mark the Augment check box for the full time, an applicant who meets both the full time and regular criteria is awarded 10 points for regular, no points for full time, and 10 augmentation points.</p> |
| (USF) Selective | <p>Select this check box if the points for this criteria are considered selective factors. The points associated with the screening requirement are shown in the Selective Factor Points category on the Screening Details page.</p> |
| Points | <p>Enter the number of points the applicant receives if they meet the requirement.</p> <p>For certain types of qualifications, this column is read-only and displays the maximum possible point value as shown on the Define Screening Points page. These qualifications include:</p> <ul style="list-style-type: none"> • Multiple-choice questions: each answer can be associated with a different number of points, and those points can be added together when there is more than one correct answer. • Open-ended questions: the question is associated with a maximum value, but evaluators rate the applicants' answers using any number of points up to the maximum. • Content types such as competencies that provide a rating scale: each rating can be associated with a different number of points, and the applicant is awarded the points for the rating that applies. <hr/> <p>Note. All qualifications that you use during screening should be associated with points. The system ignores any selected items which do not have points, and if you leave the page and come back, you will see that the Use in Screening check box has been deselected for any criteria that does not have points.</p> <hr/> |
| Total Screening Points | <p>Displays the maximum possible points for the screening level based on the entered scores, including points for all correct answers to questions, and the highest possible score for rated qualifications.</p> |

Defining Screening Points

Access the Define Screening Points page (click the Edit Details link or the Open-Ended link in the Screening Requirements group box in the Job Opening Screening Criteria page).

Define Screening Points

Competencies

Competency: Ability to manage own time

Description: Approved/Official - Proficiency

Define Points

| Rating | Points |
|-------------|--------------------------------|
| 0-None | <input type="text" value="0"/> |
| 1-Little | <input type="text" value="1"/> |
| 2-Fair | <input type="text" value="2"/> |
| 3-Good | <input type="text" value="3"/> |
| 4-Very Good | <input type="text" value="4"/> |
| 5-Expert | <input type="text" value="5"/> |

Define Screening Points page

For content types that use rating scales, review and optionally override the default points that are awarded for specific ratings.

For multiple-choice questions, review and optionally override the default point value for both correct and incorrect answers.

For open-ended questions, review and optionally override the maximum point value for the question.

Creating Job Postings

This section discusses how to:

- Create job postings.
- Add job posting details.

See Also

Chapter 6, "Setting Up Additional Recruiting Definitions," Setting Up the Job Posting Description Library, page 94

Chapter 18, "Managing Job Postings," page 541

Pages Used to Create Job Postings


| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|---------------------|------------------------|---|--|
| Job Opening | HRS_JOB_OPENING | <ul style="list-style-type: none"> Recruiting, Create New Job Opening <p>Click the Continue button on the Enter Primary Job Opening page and, if necessary, on the View Combined Profile Information page.</p> <ul style="list-style-type: none"> Recruiting, Find Job Openings <p>Click the link for a job opening in the search results, then click the Job Details tab.</p> <p>Click the link that corresponds to the type of job opening data you want to access.</p> | Enter job opening data, including job postings. |
| Posting Information | HRS_JO_PST_DTL_SEC | Click the job posting title link in the Job Postings group box on the Job Opening - Job Opening Details page. | Add job posting details. |
| Job Description | HRS_JOB_DTL_PRVW | Click the Preview button on the Posting Information page. | Preview a formatted job posting in its entirety. |

Creating Job Postings

Access the Job Opening page (select Recruiting, Create New Job Opening, then click the Continue button on the Enter Primary Job Opening page and, if applicable, on the Reviewing Profile Data page).

Note. The template for the job opening controls whether this section appears and, if so, where it appears.

Select Add Job Postings to add a new posting. To delete an existing posting select the delete icon against the posting you wish to delete.

| Job Postings | | | |
|--------------------------------------|-----------------------------|-------------------------------------|---|
| Postings | Vacancy Announcement Number | Primary Posting Title | |
| Sr Financial Analyst | | <input checked="" type="checkbox"/> |  |

[+ Add Job Postings](#)

Job Opening page: Job Postings section

Job Postings

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

Primary Posting Title Click to indicate that this is the primary posting title. The system uses the primary posting title to identify the job opening on various pages throughout the system, and posts only the primary posting information to Candidate Gateway.

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

Generally you create multiple postings if you want to post different information to different destinations. It is possible for multiple postings to have the same destination; in this case, there will be duplicate postings (although the posting titles may be different).

Adding Job Posting Details

Access the Posting Information page (click the job posting title link in the Job Postings group box on the Job Opening - Job Opening Details page).

| Job Opening | | | |
|---------------------|---|----------------------|-------------------------|
| Posting Information | | | |
| Job Postings | | | |
| Posting Title: | <input type="text" value="Manager-HR Systems"/> | | |
| Federal Information | | | |
| VA Number: | <input type="text"/> | Cleared Date: | <input type="text"/> 31 |
| Type of Examining: | <input type="text"/> | Vacancy Fill Method: | <input type="text"/> |
| Extend Date: | <input type="text"/> 31 | Early Consider Date: | <input type="text"/> 31 |
| Date Re-Opened: | <input type="text"/> 31 | Last Submit Date: | <input type="text"/> 31 |

Posting Information page (1 of 3)

Job Descriptions Find First 1 of 1 Last

*Visible: Internal and External

*Description Type: How To Apply

Description ID: All positions filled through Merit Promotion proct

Description:

Format Normal Font Size **B** **I** **U** abc

All positions filled through merit promotion procedures by the West Civilian Personnel Operations Center are filled under RESUMIX, an automated ranking and referral system.

Only one resume and supplemental data sheet is required for ALL occupational series and locations (up to a combination of 20) for which you indicate interest.

West CPOC Resumix application procedures must be followed to receive consideration. Application procedures can be obtained on the West Region Web site at: <http://www.cpo.carmy.mil>, then click on Employment Opportunities.

You will be instructed to:

- 1. Prepare a maximum 2 page resume using the Resumix format.*
- 2. Complete the Supplemental Data Sheet.*
- 3. Submit the resume by email or regular mail.*

body p span strong em

[+ Add Posting Descriptions](#)

Posting Information page (2 of 3)

Job Posting Destinations Customize Find First 1 of 1 Last

| *Destination | *Posting Type | Relative Open Date | Post Date | Remove Date | Posting Duration (Days) |
|--------------|---------------|--------------------|------------|-------------|-------------------------|
| Intranet | Internal | Seven days | 08/16/2009 | | |

[+ Add Posting Destinations](#)

OK Cancel Preview

Posting Information page (2 of 3)

Job Postings

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

(USF) Federal Information

Use the fields in this group box to meet the posting requirements for U.S. federal job openings if third-party integration has been set up.

Job Descriptions

| | |
|---------------------------------|---|
| Visible | Specify whether this posting description is visible to <i>Internal, External</i> , or <i>Internal and External</i> applicants. |
| Description Type | Select a description type. The choices available to you are defined on the job posting template that is linked to the recruitment template assigned to the job opening. |
| Description ID | Select a description from the Posting Description Library page. The system automatically populates the Description field with the text from the library posting. |
| Description | Displays the content of the selected Description ID. Use this field to modify and format the posting text in each section of the job posting. |
| Add Posting Descriptions | Click to add another section to the job posting. |

See [Chapter 6, "Setting Up Additional Recruiting Definitions," Setting Up the Job Posting Description Library, page 94.](#)

Job Posting Destinations

| | |
|--------------------|---|
| Destination | Select where you want this posting to go. Valid options are active Marketing and Company type recruitment sources. Company type recruitment sources are associated with the Sites that you define for the system. To post a job to a site, select a destination that is associated with that site. See Chapter 8, "Setting Up Recruitment Sources and Third Party Integrations," Setting Up Recruitment Sources, page 181 and Chapter 6, "Setting Up Additional Recruiting Definitions," Setting Up Sites, page 90. |
|--------------------|---|

| | |
|--|---|
| Posting Type | <p>Select the type of posting.</p> <p>Options are:</p> <ul style="list-style-type: none">• <i>Contingent</i>• <i>External</i> <p>In PeopleSoft Candidate Gateway, these are the only job postings that external applicants can see.</p> <ul style="list-style-type: none">• <i>Internal</i> <p>In PeopleSoft Candidate Gateway, these are the only job postings that internal applicants can see.</p> <ul style="list-style-type: none">• <i>Office</i>• <i>Recruitment</i> |
| Relative Open Date | <p>Choose how far in the future you want the job posting posted to this destination. If you select a value in this field, the system calculates the posting date and displays it in the Post Date field, which becomes unavailable for entry.</p> <p>For example, if the date the job opening reaches the status of <i>Open</i> is September 5, 2009 and you select <i>Ten Days</i> as the relative open date, the Post Date will be September 15, 2009.</p> |
| Post Date | <p>Enter the date on which you want the job posting posted to this destination.</p> |
| Remove Date and Posting Duration (Days) | <p>Either enter a specific date on which you want to remove the posting from this destination, or enter the number of days that the posting is to remain active. If you enter a posting duration, the system calculates the removal date and displays it in the Remove Date field, which becomes unavailable for entry.</p> |
| Preview | |
| Preview | <p>Click this button to access the Job Description page, where you can review the complete formatted job posting.</p> |

Identifying Recruiting Team Members for a Job Opening

This section provides an overview of recruiting teams discusses how to:

- Set up recruiting teams.
- Identify recruiting team members for a job opening.

Understanding Recruiting Teams

When you create a job opening, you identify the recruiters, hiring managers, interviewers, interested parties, and screening team members for the job opening.

You can set up predefined teams whose members can be added to the job opening all at once. If groups of people typically work together on the same job openings, creating teams can save you the time of individually entering each one.

When a team is added to the job opening, the system does not add the actual team ID to the job opening. Instead, users who currently belong to the team are added individually to the job opening. Administrators can remove an individual from a job opening at any time and that individual no longer has access to the job opening.

Only active teams can be added to a job opening.

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

Pages Used to Identify Recruiting Team Members for a Job Opening

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|------------------|------------------------|--|---|
| Teams | HRS_TEAM | Recruiting, Administration, Teams, Teams | Create and maintain teams that can be added to job openings. |
| Job Opening | HRS_JOB_OPENING | <ul style="list-style-type: none"> Recruiting, Create New Job Opening Click the Continue button on the Enter Primary Job Opening page and, if necessary, on the View Combined Profile Information page. Recruiting, Find Job Openings Click the link for a job opening in the search results, then click the Job Details tab. Click the link that corresponds to the type of job opening data you want to access. | Enter job opening data, including members of the hiring team. |

| Page Name | Definition Name | Navigation | Usage |
|-----------|------------------|--|---|
| Add Team | HRS_TEAM_ADD_SEC | Click the Add <team type> Team link in any of the hiring team section on the Job Opening page. | Identify a team whose members are to be added to the job opening hiring team. |

Setting Up Recruiting Teams

Access the Teams page (Recruiting, Administration, Teams, Teams).

Teams page

- Team ID** Displays the ID assigned to the team.
- Status** Specify whether this team is *Active* or *Inactive*.
- EmplID** Select the employee IDs for the members of this team.

Identifying Recruiting Team Members for a Job Opening

Access the Job Opening page (select Recruiting, Create New Job Opening, then click the Continue button on the Enter Primary Job Opening page and, if applicable, on the Reviewing Profile Data page).

Note. The template for the job opening controls which of these sections appear and where they appear.

To assign a Recruiter to the Job Opening select the Add Recruiters hyperlink. To add a Recruiter Team, containing one or more recruiters, to the Job Opening select the Add Recruiter Team hyperlink.

| Recruiters | | | |
|-------------|--------------|-------------------------------------|--|
| Name | Recruiter ID | Primary | |
| Vicky Adler | KU0105 | <input checked="" type="checkbox"/> | |

[+ Add Recruiters](#)
[+ Add Recruiter Team](#)

To assign a Hiring Manager to the Job Opening select the Add Hiring Managers hyperlink. To add a Hiring Manager Team containing one or more hiring managers to the Job Opening select the Add Hiring Manager Team hyperlink.

| Hiring Managers | | | |
|-----------------|------------|-------------------------------------|--|
| Name | Manager ID | Primary | |
| Craig Chandler | FRG001 | <input checked="" type="checkbox"/> | |

[+ Add Hiring Managers](#)
[+ Add Hiring Manager Team](#)

Job Opening page: Hiring Team tab (1 of 2)

To assign an Interviewer to the Job Opening select the Add Interviewers hyperlink. To add a team of Interviewers select the Add Interviewer Team hyperlink.

| Interviewers | | | |
|-----------------|----------------|--|--|
| Name | Interviewer ID | | |
| Craig Chandler | FRG001 | | |
| Harriet Jackson | FRG013 | | |

[+ Add Interviewers](#)
[+ Add Interviewer Team](#)

To add an interested party to the Job Opening select the Add Interested Parties hyperlink. To add a group of interested parties select the Add Interested Parties Team hyperlink.

| Interested Party |
|---|
| No Interested Parties have been added to this Job Opening |

[+ Add Interested Parties](#)
[+ Add Interested Parties Team](#)

To add a Screening Notification member to the Job Opening select the Add Screening Notification Member hyperlink. To add a Screening Notification Team to the Job Opening select the Add Screening Notification Team hyperlink.

| Screening Notification Member | | | |
|-------------------------------|---------|--|--|
| Name | Empl ID | | |
| Vicky Adler | KU0105 | | |

[+ Add Screening Notification Member](#)
[+ Add Screening Notification Team](#)

Job Opening page: Hiring Team tab (2 of 2)

Common Elements

- Name** Enter the name of the person that you want to add to one of the hiring team groups. The system displays the person's employee ID in the adjacent field.
- All members of the hiring team have access to the job opening, regardless of the person's specific role on the hiring team.
- Add <grid name>** Click to add another row to the grid.
- Add <grid name> Team** Click to access the Add Team page, where you select a team whose members are all added to the grid when you click OK.

Recruiters

Use this group box to identify recruiters for this job opening.

- Primary** Select this check box to identify the primary recruiter for this job opening. The system uses this person as the second approver of the job opening, if job opening approvals is selected on the Recruiting Installation - General page.
- See [Chapter 10, "Creating Job Openings," Understanding Job Opening Approvals, page 291.](#)

Hiring Managers

Use this group box to identify hiring managers for this job opening.

- Primary** Select the primary hiring manager or hiring manager team for this job opening. If the approval process is active, the system uses the primary hiring manager's supervisor as the first approver for this job opening.
- See [Chapter 10, "Creating Job Openings," Understanding Job Opening Approvals, page 291.](#)

Interviewers

Use this group box to identify interviewers for this job opening.

The system uses this list of interviewers as the default list when you schedule interviews for the job opening.

See [Chapter 14, "Interviewing Applicants," page 423.](#)

Interested Party

Use this group box to identify interested parties for this job opening. When you use the PeopleSoft system to send email to applicants, you can optionally copy the interested parties for the job opening.

See [Chapter 19, "Managing Applicants," Sending Correspondence and Recruitment Letters, page 591.](#)

Screening Notification Member

Use this group box to identify members of the screening team for this job opening.

Creating Job Openings from Positions or from Other Job Openings

This section provides an overview of alternative job creation methods and discusses how to:

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

Understanding Alternative Job Creation Methods

This overview discusses two additional ways to create job openings.

Job Opening Creation from Open Positions

To create job openings from open positions, run the Create Job from Position Application Engine process (HRS_CRJOB).

Note. This feature is available only to organizations that use partial or full position management.

During the Create Job from Position process, the system:

1. Determines all current open positions in the company.

To determine whether a position is open, the system uses the PS_POSN_VACANT view on the Position Data table (PS_POSITION_DATA).

2. Identifies the maximum head count allowed for each open position.
3. Determines the current head count for each open position (how many incumbents, or current employees, fill any or all of the head count).

4. Creates one standard requisition job opening for each position number that has openings and sets the status of each new job opening to Draft.

When the system creates a new job opening, it populates the job opening data with data from the position or the derived job code—for example, the business unit, job code, company, department, location, and staffing and salary information. The system also populates the Target Openings field on the Job Opening page with the number of openings (maximum head count minus current head count) for that position number.

If you select the Allow Duplicates check box on the Create Job Openings from Positions page, the system creates a job opening for all open positions, regardless of whether a job opening for a position already exists.

If you deselect the Allow Duplicates check box on the Create Job Openings from Positions page, the system checks to see if a job opening already exists for each position number. If a job opening already exists for a position number, the system creates a new job opening only if the number of open positions (maximum head count minus current head count) is greater than the number of target openings on the Job Opening page for the existing job opening. For example, if a position has five openings and a job opening already exists for that position with a target opening value of two, the system creates one new job opening with three as the target opening value.

The system uses the position data along with the segmenting type that is specified in the Template Segmenting Type field on the Recruiting Installation - General page to select a recruitment template for each job opening. Because position data can be different for each position, the system could potentially use a different recruitment template for each job opening that it creates.

When you run the process, you must specify an originator. The originator appears in the Created By field on the Job Opening page, and will have access to the job openings after the system creates them. After the process completes, the originator will be able to access the new job openings through existing recruiting components, complete the necessary data entry—for example, screening, posting, and approval information—and submit the job opening for approval or save as normal, depending on whether the system requires approval for standard requisitions job openings.

Note. The user must also have the HCCPRS0000 permission list to access the page where you run the Create Job from Position process.

See [Appendix B, "Delivered Permission Lists and Roles for Talent Acquisition Manager," page 713.](#)

Job Opening Cloning

Another way to create a job opening is to clone an existing one. You can clone existing job openings that have any status except *Draft*.

To clone a job opening, find the job opening that you want to clone and click the Clone Job Opening icon or link. The initial status of the newly created job opening depends on whether approvals are active:

- If approvals are active, the status is *Draft*.

This gives the creator an opportunity to review and modify the new job opening before manually submitting it.

- If approvals are not active, the status is *Open*.

Although the job opening is open, posting information (Relative Open Date, Post Date, and Remove Date) is not copied, so the job is not posted.

When you clone a job opening most of the data is copied from the existing job opening to the new one. However, some data will be left blank or adjusted, as detailed in this table:

| Existing job opening | New job opening |
|---|---|
| Status | <i>Open</i> if approvals is not selected on the Installation table. <i>Draft</i> if approvals are associated with the job opening. |
| Status Reason | <i>New Authorization</i> |
| Open Date | Current Date |
| Status Date | Current Date |
| Desired Start Date/Projected Fill Date | Set according to the dates in the Open Date field. The system uses the interval between the original job opening's open date and its desired start date or projected fill date to determine the dates for the cloned job opening. |
| All other dates | Blank |
| Applicant and interview schedule data | Not copied |
| Approval process, if one exists | Copied |
| Primary Recruiter/Hiring Manager Teams | Active teams copied |
| Additional recruiters, hiring managers, and teams | Active teams copied |
| Posting dates | Not copied. |

Pages Used to Create Job Openings from Positions or from Other Job Openings

| Page Name | Definition Name | Navigation | Usage |
|------------------------------------|------------------------|--|--|
| Create Job Openings from Positions | HRS_RUN_CR_JOB | Recruiting, Administration, Create Openings from Positions, Create Job Openings from Positions | Create job openings from open positions. |

| Page Name | Definition Name | Navigation | Usage |
|-------------------|------------------|--|----------------------|
| Clone Job Opening | HRS_JO_CLONE_SEC | Recruiting, Find Job Openings. Click a job opening to access the Job Opening page. Click the Clone Job Opening icon or the Clone link on the Job Opening page. | Clone a job opening. |

Creating Job Openings from Open Positions

Access the Create Job Openings from Positions page (Recruiting, Administration, Create Openings from Positions, Create Job Openings from Positions).

Create Job Openings from Positions page

Allow Duplicates Select to have the system create job openings for all position openings, regardless of whether a job opening already exists for a position. Deselect this option if you do not want the system to create duplicate job openings. By default, this option is deselected.

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

Cloning a Job Opening

Access the Clone Job Opening page (click the Clone Job Opening icon or the Clone link on the Job Opening page).

The screenshot shows a web form titled "Clone Job Opening" under a "Job Opening" header. The form contains a section labeled "Enter Details" with two fields: "Job Opening ID" (value: 503712) and "Number of New Job Openings" (value: 1). Below the form are two buttons: "Clone Job Opening" and "Cancel".

Clone Job Opening page

| | |
|-----------------------------------|---|
| Job Opening ID | Displays the job opening ID for the job opening that you want to clone. |
| Number of New Job Openings | Enter the number of job openings that you want to create. |
| Clone Job Opening | Click to clone the job opening. The system displays a confirmation message. |

Approving Job Openings

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

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

Understanding Job Opening Approvals

Recruiting Solutions uses the *JobOpening* approval process definition, created in the Approval component (PTAF_TXN), to manage approval processing for job openings.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Approvals," Setting Up Approval Process Definitions.

Approval Activation

To activate approval processing for job openings, use the check boxes in the Approvals Required group box on the Recruiting Installation - General page. There are separate check boxes for standard requisitions and continuous job openings; select the check boxes for the types of job openings that require approval.

Approver Actions

When a recruiter creates and submits a job opening, the system checks whether approval is required for that job opening type. If approval is required, the system initiates the approval process.

Approvers can take action on the request in the Pending Approvals component or on the Job Opening - Approval page, which they can access by using the link in the email notification that they receive. Also, the Find Job Openings and Browse Job Openings pages enable approvers to select one or more pending job openings from the job opening list and to act on the approval request using the Select Action field.

Administrators can also take action on a pending approval, but only from the Job Opening page. This ensures that the administrator reviews the job opening data before taking action. Administrators can not approve job openings from the Find Job Openings or Browse Job Openings page, even though the Approve, Deny, and Pushback actions are available for selection.

Important! If a user other than the assigned approver (or that approver's proxy) initiates an approval-related action on the Find Job Openings page or the Browse Job Openings page, the action will *not* update the job opening.

Approvers can also add additional approvers or reviewers to an individual job offer by clicking on the Insert Approver icon on the Manage Applicants - Disposition Details page and entering information for the additional approver or reviewer on the Insert additional approver or reviewer page.

Approvers have the option of either:

- Approving the job opening.

The system records the approval and notifies the next approver, if any. When the final approver approves the job opening, the system sets the job opening status to *Open*.

- Denying the job opening.

The system sets the job opening status to *Denied*, stops the progress of the job opening, and notifies the hiring manager. However, the originator of the job opening can later resubmit the job opening.

- Pushing back the job opening.

The system notifies the previous approver that the job opening has been pushed back and needs his or her attention.

Pushing back a job opening takes a currently pending step out of pending status and requeues the previous step to its approvers. The purpose of push back is to question the prior step's approval and request clarification. Because push back only makes sense if there is a previous approver, the first approver cannot push back.

Note. The job opening approval process does not support self-approval. The system always treats the primary hiring manager as the requester, regardless of who actually creates the job opening. Therefore, if the primary hiring manager's supervisor (the first approver) creates the job opening, the system does not recognize that the requester is also the approver.

The Delivered Two-Step Job Opening Approval Process

The delivered approval process for job openings requires two approvers:

1. The first approver is the supervisor of the person or persons entered as the primary hiring manager on the Job Opening page.

To identify the supervisor, the system uses the Target Information page.

2. The second approver is the recruiter or recruiters entered as the recruiter for the job opening.

This is how the delivered two-step job opening approval process works:

1. A recruiter, also known as the originator, creates a job opening and submits it.

The system sets the job opening status to *Pending Approval*. The system also identifies the first and second approvers and displays the Job Opening - Approval page that summarizes who is in the two-step approval process.

2. The system notifies the first approver.

The first approver is the supervisor of the person entered as the primary hiring manager on the Job Opening page. If there is more than one hiring manager and none is marked as primary, or if there is no hiring manager, then the first approval step is skipped. To identify the supervisor of the hiring manager, the system uses the Target Information page.

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

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Self-Service Transactions," Setting Up Access to Direct Reports Data.

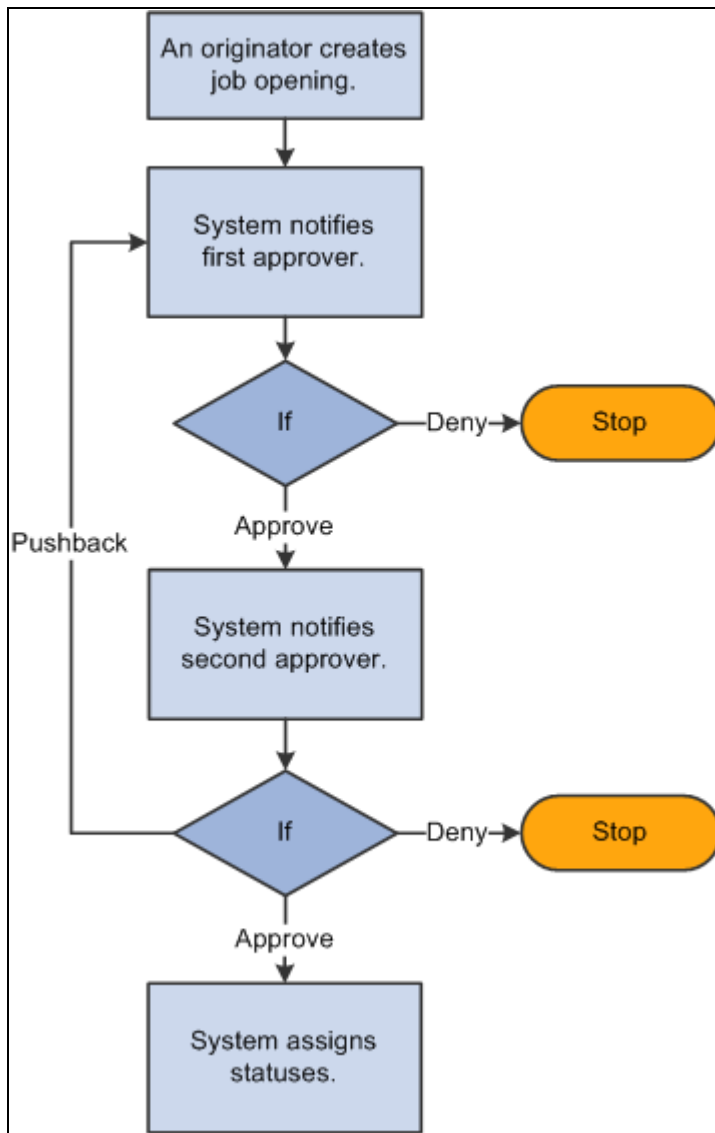
3. If the first approver approves the job offer, the system notifies the second approver.

The second approver is the primary recruiter for the job opening.

If there is no primary recruiter, the system routes the approval request to the Recruiting Solutions Approval Administrator.

4. If the second approver approves the job opening, the system updates the status of the job opening to Open and ends the approval process.

This diagram shows the delivered two-step approval process during which two approvers sequentially approve or deny a job opening.



Delivered two-step approval process for job openings

Changes to Job Opening Data During Approval Processing

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

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

The fields that can cause a trigger to occur are:

- Target Openings.
- Job Code.
- Position Number.

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

Approval Delegation

If you enable delegation for job opening approval, approvers can delegate approval authority to proxies for specified amounts of time. The system gives the proxy access to the Pending Approvals component, which displays the job openings for which approval has been delegated.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Self-Service Transactions," Setting Up Access to Direct Reports Data

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Approvals"

[Chapter 9, "Understanding Approval Delegation in Talent Acquisition Manager," page 197](#)

Pages Used to Approve Job Openings

| Page Name | Definition Name | Navigation | Usage |
|---------------------------------|------------------------|---|--|
| Pending Approvals | HRS_RECRUIT_CONSOL | Recruiting, Pending Approvals, Pending Approvals | View pending approvals and approve job openings. |
| Job Opening page: Approvals tab | HRS_JOB_OPENING | Click the subject link on the Pending Approvals page. | Approve a job opening or add approvers or reviewers to the approval process. |

| Page Name | Definition Name | Navigation | Usage |
|--|-----------------|--|---|
| Insert additional approver or reviewer | NA | <ul style="list-style-type: none"> Click the Insert Approver icon on the Job Approvals page. Click the Insert Approver icon on the Disposition Details page. | Add approvers or reviewers to the approval process. |

Viewing Pending Approvals

Access the Pending Approvals page (Recruiting, Pending Approvals, Pending Approvals).

Pending Approvals

Pending Approvals Customize | View All | [?] First 1-3 of 3 Last

| ID Nbr | Sender | Received | Subject |
|---------------------------------|-------------------|------------|---|
| <input type="checkbox"/> 300162 | Ponciano Batalang | 05/20/2009 | Job Approval: Guest Manager |
| <input type="checkbox"/> 500410 | Ponciano Batalang | 06/12/2009 | Job Approval: Operator-Computer |
| <input type="checkbox"/> 10261 | Betty Locherty | 05/20/2009 | Offer Approval: Elfrieda Penner |

Select All Deselect All

Pending Approvals page

To approve or deny multiple pending approvals, select the check box for the job openings and job offers that you want to approve or deny, select *Approve* or *Deny* from the Select field and click Go. The system approves or denies the selected pending approvals and removes them from the page.

Subject Click a job approval link to access the Job Opening page, where you can view details for and approve the job opening.
 Click an offer approval link to access the Manage Applicant - Disposition Details page, where you can view details for and approve a job offer.

Approving a Job Opening

Access the Job Opening page: Approvals tab (click the subject link for a job approval on the Pending Approvals page).

Create New Job Opening

Job Opening

[Print Job Opening](#)

| | | | |
|---------------------|---------------------------------|-----------------|----------|
| Posting Title: | Guest Manager | Job Opening ID: | 300162 |
| Job Opening Status: | 006 Pending Approval | Job Type: | Standard |
| Job Title: | Guest Services Manager | Job Code: | N00010 |
| Position Number: | 19143004 Guest Services Manager | | |
| Business Unit: | NSWBU Swiss Hotels | | |
| Job Family: | N40000 RS Services Job Family | | |

Save
 Clone
 Create New

[Previous Job Opening](#)
[Next Job Opening](#)
[Job Opening List](#)

Job Details
Qualifications
Screening
Job Postings
Hiring Team

Approvals

Job Approvals

Supervisor/Recruiter Grp Aprv

JobOpening: Pending
[Request Information](#)

Route to Supervisor/Recruiter

Approved

Test User: HCQAN-MSPVR
 Hiring Manager Posn Supervisor
 06/12/09 - 04:02 PM

→

Pending

Test User: HCQAN-R
 Recruiter Group

+

Approve
Pushback
Deny

Comments Text:

Job Opening page: Approvals tab

Note. The Approvals tab appears on the Job Opening page only after the job is submitted for approval.

JobOpening: <status>

This group box displays a graphical representation of the approval process. There is a box for each approver. The box title shows the approver's status, while the box contents include the approver's name, the approver's role in the approval process (for example, the hiring manager's supervisor), and the date, if any, when the approver took action on the approval request.

Additional graphical elements in this group box include color-coding the approver boxes according to the approver's status, and status icons next to the approver's user ID.

<approver User ID> Click the approver's user ID to display additional information about the approver.



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 approvers other than the first approver.

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

Deny

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

Adding Another Approver or Reviewer

Access the Insert additional approver or reviewer page (click the Insert Approver icon on the Job Approvals page or on the Disposition Details page).

Insert additional approver or reviewer page

User ID

Select the user ID of the person that you want to add.

Insert as

Specify whether this user is added as an approver or reviewer.

Chapter 11

Entering Applicant Data

This chapter provides overviews of applicant records and of profile information in job applications. It then lists common elements used on applicant data pages and describes how to:

- Enter contact information.
- Enter job applications.
- Enter references.
- Enter applicant eligibility and identity information.

Understanding Applicant Records

This overview discusses:

- Applicant record creation.
- Applicant data.
- Job applications.

Applicant Record Creation

There are four ways that applicant records are created in the system:

- Recruiters, recruiting administrators, and managers use the Add New Applicant (HRS_ADD_APPLICANT) page to manually create a record.

This chapter discusses the Add New Applicant component.

- Applicants use Candidate Gateway to submit an application.

See *PeopleSoft Enterprise Candidate Gateway 9.1 PeopleBook*, "Using Candidate Gateway," Applying for Jobs.

- Applicants send their resumes to an email address, and a third-party resume reader reads the resume text, converts the text to data, and creates the applicant record.

See [Chapter 20, "Managing Resumes," Loading Resumes, page 640.](#)

- Resumes that are received from third-party staffing suppliers (such as job boards and recruitment agencies) are processed through the Open Integration Framework.

See [Chapter 20, "Managing Resumes," Open Integration Framework, page 636](#).

Note. Use the Manage Applicant component to view and update applicant data, regardless of how that data entered the system. On the Manage Applicant page, the Applicant Data tab provides the same sections as the Add Applicant page.

See Also

[Chapter 19, "Managing Applicants," Reviewing Applicant Data, page 580](#)

Applicant Data

On the Add New Applicant page (and on the Manage Applicant page: Applicant Data tab), applicant data is organized into four sections:

- Contact details.
- Applications.
- Verification.
- Eligibility & Identity.

Contact Details

Contact details include basic identifying information about the applicant along with the applicant's name, address, email addresses, and phone numbers.

Note. You must enter and save the applicant's first and last name before you can access the Applications section of the applicant data.

The Contact Details section is also where you specify the applicant type:

- *External*: The applicant has never worked for your organization.
- *Employee*: The applicant is a current employee.
- *Non-employee*: The applicant exists in your system, but as a person of interest rather than as an employee.

If you select an existing employee ID to associate with the applicant, the system uses that information to set the applicant type to either *Employee* or *Non-employee*. If you clear the employee ID, the system changes the employee type to *External*.

When you select an employee ID, the system copies employee data into corresponding fields in the applicant record. Copied data includes personal information, eligibility & identity information, and profile information. The profile data is part of the job application; access the Applications subsection and then view the job application to review the profile data.

See [Chapter 11, "Entering Applicant Data," Profile Data for Internal Applicants, page 303](#).

Applications

The Add New Applicant page does not display the Applications subsection until you save the record with at least a first name and last name.

You can create an unlimited number of job applications for an applicant. Each application can be linked to a different job opening, or to no job opening.

See [Chapter 11, "Entering Applicant Data," Job Applications, page 301](#).

Verification

Use the Verification section of the applicant data to review and add references for the applicant.

Also, if the applicant data includes an email address, you can use this section to request references. The system sends an email to the applicant and, for Candidate Gateway users, places a reference request notification in the notifications section of the Careers Home page in Candidate Gateway. A request for references does not create a contact note; no history of requests is maintained.

Eligibility & Identity

Enter eligibility and identify information as required by your organization or to comply with local or country regulatory requirements. Eligibility and identity information includes, but is not limited to, data such as:

- National IDs
- Citizenship
- Visa and work permits
- Bank accounts
- Disabilities
- Accommodation requests and options
- Country-specific data.

Job Applications

An applicant can have an unlimited number of job applications. Each application can be linked to one or more specific job openings, or to no job opening.

The application form includes these sections:

- Resumes.

This section can include a resume attachment or resume text that is entered directly in the system (either on this page or in Candidate Gateway). Rich text editing is available for formatting resume text.

- Attachments

You can add cover letters, transcripts, references, or any other attachments that are relevant to the job application.

- Preferences, including job openings.

General preferences include information such as the employee's preferred start date and schedule, willingness to relocate or travel, geographic preferences, salary requirements, and shift preferences.

Job preferences can include preferred job families or specific job openings. Including a specific job opening on the application links the applicant is linked to the job opening. If you use the delivered status rules, the applicant's initial disposition for the job opening is *Applied*.

- Personal information.

Personal information includes a disability code, eligibility to work in the U.S., and information about previous employment with your organization. The system does not verify any of this data.

- Referral source.

Applicant who are referred by employees can identify the referring employee.

- Work experience.

Required data for each work experience entry includes the employer name, the employment start and stop date, and the ending job title. Additional fields capture salary information, the employer's phone number and address, and any freeform comments.

- Education level.

This is a single entry for the applicant's highest education level. If you want details about the applicant's degrees, areas of study, or other education background, use the appropriate profile content type.

- Qualifications (profile content types).

The Application Data page includes a grid for every content type in the system's primary person profile. Use these grid to add specific content items to the application.

Examples of delivered content types include competencies, degrees, licenses and certifications, and language skills.

- (USF) Priority placement.

Priority placement entitles the applicant to certain preferential consideration during the screening process.

See [Chapter 5, "Setting Up Screening Processes," \(USF\) Setting Up Preference Programs, page 81](#).

- (USF) Federal preferences.

Use this section to record additional federal preference information

Note. When you enter application data using the Add New Applicant page in PeopleSoft Talent Acquisition Manager, you use a single page that includes all possible sections. When applicants apply using Candidate Gateway, the organization and presentation of the application data fields is different, and applicants do not necessarily see all of the sections or all of the profile content types that appear on the Add New Applicant page.

See Also

[Chapter 7, "Setting Up Recruiting Templates," Understanding Resume Templates, page 115](#)

PeopleSoft Enterprise Candidate Gateway 9.1 PeopleBook, "Using Candidate Gateway," Applying for Jobs

Understanding Profile Information in Job Applications

This section discusses the use of profile information in job applications.

Profile Architecture

Profiles describe the attributes of jobs or individuals. In PeopleSoft Enterprise Human Resources, you use the Manage Profiles business process to set up *content types* for a profile. Content types are categories of person or job attributes. For example, Oracle delivers content types for competencies, degrees, licenses & certifications, and many other attributes that are relevant to recruiting.

Content items are the specific attributes that the person or job has—that is, the specific competencies, degrees, and so forth.

Optional *Instance Qualifiers* provide logical groupings for content items. For example, competency ratings use the evaluation type as an instance qualifier. This enables the system to differentiate between self-evaluations, manager evaluations, peer evaluations, and so forth. Profile settings determine which types of evaluations are visible to employees and which types can be updated by employees.

The content types that are available for use in PeopleSoft Enterprise Talent Acquisition Manager are those that belong to the primary person profile type as defined on the Assign Profile Type Defaults page. Only unsecured content types (those that everyone is allowed to see) are used.

Profile Data for Internal Applicants

Talent Acquisition Manager uses applicant profile information to capture the applicant's qualifications and skills and to match those to job openings, which also include profile information. The applicant's profile information is contained in the job application.

Because your employees already have profiles, the system copies employee profile data into the job applications that an internal applicant creates. The internal applicant can optionally modify the profile data in the application before submitting it.

Note. An employee can have multiple person type profiles. Talent Acquisition Manager uses only the profile with the primary person profile type. If the employee does not have this type of profile, no profile data is copied into the application.

When copying employee profile data into an application:

- The system imports only content items that are visible to employees.
- For content items that have instance qualifiers (such as the rating type for a competency rating), the system imports only those content items that have an instance qualifier that is visible to employees (for example, self-evaluations, but not peer evaluations).

- For content items that use the employee default instance qualifier (for example, self-evaluation), the system merges the content items from the employee profile and from the job opening qualifications.
- Only content items that have the employee default instance qualifier (for example, self-evaluation) are available for editing.

If the employee subsequently creates an additional application, the system pulls the employee data into the new application, and also adds any content items from existing applications (that is, content items that were added to the applicant data but not to the employee profile). This ensures that any modifications made to the profile data on the previous job application are carried through to future job applications.

Changes to applications never get copied to the employee profile data. And after the system initially populates the profile data in a job application, changes to profile data in one application (or in the employee profile) do not affect any other applications.

See [Chapter 3, "Setting Up Profile Integration," page 25](#).

Competency Evaluation Types in Job Applications

In job openings, content types represent desirable (or required) attributes for applicants. For many content types, the applicant either will or won't have the attribute.

Competencies present a more complex situation because they include a rating scale and an evaluation type. The evaluation type indicates who assigned the rating. When an employee submits an application and the employee's existing competency ratings are copied into the application, it is important that the employee not be able to modify ratings where the evaluation type is anything other than *Self*.

Profile architecture uses the concept of an *Instance Qualifier* to organize content types according to specified data. In the case of competencies, the evaluation type is the instance qualifier. The instance qualifier setup for competencies not only lists the evaluation types, it indicates which ones employees can view (for example, employees can view manager evaluations, but not peer evaluations), and which one is the default value for employees (for competencies, *Self* is the employee default).

Job applications handle content items with instance qualifiers according to these rules:

- When an internal applicant applies, only contents items that are visible to employees are copied from the employee's primary person profile into the job application, and only content items with the employee default instance qualifier are editable.

For example, an employee creates an application, and the system copies the employee's manager evaluations and self evaluations into the application. It does not copy peer evaluations. The employee can see both the manager evaluations and self-evaluations, but can only edit or add self-evaluations.

Note. If the applicant later submits an additional application, the content items are again copied from the primary person profile, and any additional content items that were added in the previous application are also carried over to the next application. The applicant's ability to add additional content items depends on the settings on the Content Section Configuration page.

- When an external applicant applies, instance qualifiers are not shown, but the employee default instance qualifier is assigned to any content items that the employee adds.

For example, an external applicant who adds a competency and rating to the application does not see that the rating is associated with the *Self* evaluation type.

Recruiting users can add content items with other instance qualifiers (for example, a competency rating with an *Executive Committee* evaluation type), but these content items are not visible to the applicant.

Common Elements on Applicant Data Pages

| | |
|----------------------------------|--|
| Applicant ID | This identification number is automatically assigned by the system when you first save the applicant record. |
| Add Applicant | Click this link to begin adding a new applicant record. |
| Manage Applicant Activity | Click this link to save the applicant data and then access the applicant's data in the Manage Applicant page. See Chapter 19, "Managing Applicants," page 557 . |

Entering Contact Information

This section discusses how to enter contact information.

Page Used to Enter Contact Information



| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|--|------------------------|---|---|
| Add New Applicant: Contact Details section Manage Applicant page: Applicant Data tab: Contact section | HRS_ADD_APPLICANT | <ul style="list-style-type: none"> Recruiting, Add New Applicant, Add New Applicant <p>Access the Contact Details section.</p> <ul style="list-style-type: none"> Recruiting, Find Applicants, Find Applicants <p>Click an applicant name to access the Manage Applicant page, then access the Applicant Data tab: Contact section.</p> | Enter contact information for an applicant. |

Entering Contact Information Details

Access the Add New Applicant page: Contact Details section (Recruiting, Add New Applicant, Add New Applicant).



Add New Applicant

Applicant ID: 500184

 [Add Applicant](#)  [Save](#) [Manage Applicant Activity](#)

Contact Details | [Applications](#) | [Verification](#) | [Eligibility & Identity](#)

Applicant Information

| | | | | |
|---------------|---|---|--------------------|---|
| Empl ID: | <input type="text"/> |  | *Applicant Type: | <input type="text" value="External Applicant"/> |
| *Status Code: | <input type="text" value="Active"/> | | Status Reason: | <input type="text"/> |
| Status Date: | <input type="text" value="08/04/2009"/> |  | Preferred Contact: | <input type="text" value="Not Specified"/> |

Name

| | |
|--------------|--------------------------------------|
| Name Format: | <input type="text" value="English"/> |
| Name Prefix: | <input type="text"/> |
| *First Name: | <input type="text" value="Nora"/> |
| Middle Name: | <input type="text"/> |
| *Last Name: | <input type="text" value="Massey"/> |
| Name Suffix: | <input type="text"/> |

Add New Applicant page: Contact Details section (1 of 2)

Address

Country:

Address 1:

Address 2:

Address 3:

City:

State:

Postal:

County:

Email Addresses Customize | Find | First 1 of 1 Last

| Preferred | Email Type | Email Address | |
|-------------------------------------|------------|--|--|
| <input checked="" type="checkbox"/> | Home | <input type="text" value="nora.massey@email.com"/> | |

[+ Add Email Address](#)

Phone Numbers Customize | Find | First 1 of 1 Last

| Preferred | Phone Type | Telephone | Extension | Country Code | |
|-------------------------------------|------------|---|----------------------|----------------------|--|
| <input checked="" type="checkbox"/> | Home | <input type="text" value="415/999-9999"/> | <input type="text"/> | <input type="text"/> | |

[+ Add Phone Number](#)

Add New Applicant page: Contact Details section (2 of 2)

Applicant Information

Empl ID

If this is a current or former employee, or a person of interest, select the employee ID. When you select an employee ID, the system copies information from the PeopleSoft 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. This is the overall applicant status, not the applicant's disposition with regards to any particular job opening.

You can use the status values that are provided with the PeopleSoft system, or you can define your own status values and rules. As delivered, the statuses 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 delivered status change effect rules ensure that the applicant's overall status is set to *Hired* when the applicant's disposition for a particular job opening changes to *Hired*.

- *Inactive*: Use this status for applicants that have withdrawn.

Under the delivered status change effects, when you change an applicant's status to *Inactive*, the applicant's disposition for any job openings that they have applied for is set to *Withdrawn*. The system excludes inactive applicants from job opening screening.

The system also assigns this status when an applicant's resume is in a Rejected status as part of the resume extraction process.

- *Queued*: The system assigns this status when an applicant's resume is in a Draft or Unresolved status as part of the resume extraction process.

A recruiter could also set this status on the Add New Applicant or Manage Applicant pages if they wanted to note that this applicant needs additional information to be collected or some other action before becoming an active applicant.

Status Reason

Select a status reason. Define status reasons for status codes on the Statuses and Reasons page.

Status Date

Enter a status date.

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

Preferred Contact

Select the preferred method of contact for the applicant. Values are: *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.

Email 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 Job Applications

This section discusses how to:

- Review an applicant's applications.
- Enter application details.
- Enter content item details.

Pages Used to Enter Application Details

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|--|------------------------|---|--|
| <p>Add New Applicant page: Applications section</p> <p>Manage Applicant page: Applicant Data tab: Applications & Resumes section</p> | HRS_ADD_APPLICANT | <ul style="list-style-type: none"> Recruiting, Add New Applicant, Add New Applicant <p>Access the Applications section.</p> <ul style="list-style-type: none"> Recruiting, Find Applicants, Find Applicants <p>Click an applicant name to access the Manage Applicant page, then access the Applicant Data tab: Applications & Resumes section.</p> | Review a list of the applicant's job applications. |



| Page Name | Definition Name | Navigation | Usage |
|-------------------------------|------------------------|---|---|
| Application Details | HRS_APP_PROFILE | <ul style="list-style-type: none"> Click the Add Application or Edit Application link on the Add New Applicant page: Applications section. Click the Add Application link or the Edit Application icon on the Manage Applicant page: Applicant Data tab: Applications & Resumes section. Click the Application icon in various applicant grids, including the search results grid on the Find Applicants page and the Manage Applicants grid on the Job Opening page. Recruiting, Find Job Openings, Find Job Openings. <p>Access a specific job opening, then on the Job Opening page, select <i>Edit Application</i> from the Group Action field and click the Go button.</p> | Enter or review the applicant's complete job application details. |
| Resume Text Printable Version | HRS_RESDTL_SEC | Click the Printable Version link in the Resume Text section of the Application Details page. This link appears only after the application has been saved. | View resume test on a printer-friendly page. Use your browser's print command to print this page. |
| View Questionnaire | HRS_APP_QSTN_RSLT | Click the View Questionnaire link in the Job Openings grid on the Application Details page. The link appears only for job openings that are associated with screening questions, and the link is active only if the applicant has completed the questionnaire. | Review an applicant's answers to a completed questionnaire. |

| Page Name | Definition Name | Navigation | Usage |
|---|-----------------|--|---|
| Add Work Experience Edit Work Experience | HRS_APP_WRK_SEC | Click the Add Work Experience link or the Edit Employment History link in the Work Experience area of the Application Details page. | Enter work experience information. |
| Add <Content Type> Update <Content Type> | HRS_APP_DETAIL | <ul style="list-style-type: none"> Click the Add <Content Type> link under a content type grid on the Application Details page. Click an existing entry in any content type grid on the Application Details page | Add or update applicant profile information such as competencies, degrees, licenses & certificates, language skills, and so forth. See Chapter 11, "Entering Applicant Data," Understanding Profile Information in Job Applications, page 303. |
| Add Priority Placement | HRS_CE_ADM_PP | Click the Add Priority Placement link or the Edit Priority Placement link on the Application Details page. | Add or edit priority placement information. |




Review an Applicant's Applications


Access the Add New Applicant page: Applications section (select Recruiting, Add New Applicant, Add New Applicant, then click the Applications link).

Add New Applicant

 [Add Applicant](#)
 [Save](#)
[Manage Applicant Activity](#)

[Contact Details](#)
| [Applications](#)
| [Verification](#)
| [Eligibility & Identity](#)

| Applications Customize Find  First  1 of 1  Last | | | |
|--|-------------------|-----------------|----------------------------------|
| Resume Title | Last Updated | Last Updated By | Edit Application |
| Rita Snow Resume | 08/04/2009 3:31PM | PS | Edit Application |

 [Add Application](#)

Add New Applicant page: Applications section

Note. You can create multiple applications for an applicant.

Applications

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

Edit Application

Click this link to access the Application Details page.

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

Add Application

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


For this link to work, you must enter a first and last name for the applicant on the Add New Applicant page: Contact Details section. When you click this link, if you haven't already saved the page, the system saves the applicant and generates an applicant ID.

Entering Application Details

Access the Application Details page (click the Edit Application link or the Add Application link on the Add New Applicant page: Applications section).

Add New Applicant

Application Details

Applicant Name: [Rita Snow](#)  [Print Application Details](#)

Applicant ID: 500187


[Return to Previous Page](#)

Resume Text

Resume Title:



Language Code:


Resume Text [Printable Version](#)



[Rita_Snow_Resume.doc](#)

Attachments

Customize | Find | View All |  |  First **1 of 1** Last

| File Name | *Description | Attachment Type Code | Type Description | Last Updated | Uploaded By |
|---|-----------------|---|------------------|-------------------|----------------|
| <input type="checkbox"/> RSnow_Cover_Letter.doc | RSnow_Cover_Let | 004  | Cover Letters | 08/04/2009 3:36PM | Betty Locherty |

Application Details page (1 of 6)

Preferences

Desired Start Date: 08/24/2009

Regular/Temporary: Full/Part-Time:

Willing to Relocate Willing to Travel Travel Percentage:

Geographic Preference

First Choice: Second Choice:

Comments:

Desired Work Days

Monday Tuesday Wednesday Thursday
 Friday Saturday Sunday

Minimum Pay: Currency Code:

Pay Frequency:

Desired Shift: Desired Hours Per Week:

Letter:

Date Printed: [Generate Letter](#)

Job Families [Customize](#) | [Find](#) | [View All](#) | | [First](#) 1 of 1 [Last](#)

| Job Family | Description |
|----------------------|-------------|
| <input type="text"/> | |


[+](#) [Add Job Family](#)



Job Openings [Customize](#) | [Find](#) | [View All](#) | | [First](#) 1 of 1 [Last](#)


| Job Opening ID | Posting Title |
|----------------------|---------------|
| <input type="text"/> | |

[+](#) [Add Job Opening](#)

Application Details page (2 of 6)

| Personal Information | |
|-----------------------------|---|
| Eligible to Work in U.S.: | <input type="text" value="No"/> |
| *Are you a former employee: | <input type="text" value="No"/> |
| Previous Termination Date: | <input type="text" value=""/>  |

| Referral Source | |
|---------------------------|---|
| Source ID: | <input type="text" value=""/>   |
| SubSource ID: | <input type="text" value=""/> |
| Specific Referral Source: | <input type="text" value=""/> |

| Work Experience | |
|---|-------------------------------------|
| No work experience has been added to this applicant's profile. | |
|  | Add Work Experience |

| Education Level | |
|--------------------------|--|
| Highest Education Level: | <input type="text" value="A-Not Indicated"/> |

Application Details page (3 of 6)

| |
|--|
| Training |
| No Training has been added to this applicant's profile. |
| + Add Training |
| Areas of Study |
| No Areas of Study have been added to this applicant's profile. |
| + Add Areas of Study |
| Competencies |
| No Competencies have been added to this applicant's profile. |
| + Add Competencies |
| Degrees |
| No Degrees have been added to this applicant's profile. |
| + Add Degrees |
| School Education |
| No School Education have been added to this applicant's profile. |
| + Add School Education |
| E&G Special Projects |
| No E&G Special Projects have been added to this applicant's profile. |
| + Add EG Special Projects |

Application Details page (4 of 6)

| |
|--|
| Memberships |
| No Memberships have been added to this applicant's profile. |
| + Add Memberships |
| Responsibilities |
| No Responsibilities have been added to this applicant's profile. |
| + Add Responsibilities |
| Special Projects |
| No Special Projects have been added to this applicant's profile. |
| + Add Special Projects |
| Travel Preferences |
| No Travel Preferences have been added to this applicant's profile. |
| + Add Travel Preferences |
| Tests/Examinations |
| No Tests/Examinations have been added to this applicant's profile. |
| + Add Tests/Examinations |
| Copy Limited Items From Job Openings |

Application Details page (5 of 6)

▼ 🇺🇸 US Federal

Priority Placement

No Placement has been added to this applicant's profile

+ [Add Priority Placement](#)

Federal Preferences

| | |
|------------------------------|--|
| Federal civilian employee? | <input type="checkbox"/> Previous Federal Employee <input type="checkbox"/> Previous Agency Employee <input type="checkbox"/> Current Federal Employee <input type="checkbox"/> Current Agency Employee |
| Highest Pay Plan: | <input style="width: 80%;" type="text"/> 🔍 |
| Highest Grade: | <input style="width: 80%;" type="text"/> 🔍 |
| Minimum Acceptable Pay Plan: | <input style="width: 80%;" type="text"/> 🔍 |
| Minimum Acceptable Grade: | <input style="width: 80%;" type="text"/> 🔍 |
| Highest Career Tenure: | <input style="width: 80%;" type="text"/> ▼ |
| Veterans Preference: | None ▼ |
| Reserve Category: | <input style="width: 80%;" type="text"/> ▼ |
| Uniformed Service: | <input style="width: 80%;" type="text"/> ▼ |
| Military Grade: | <input style="width: 80%;" type="text"/> ▼ |
| Military Separation Status: | <input style="width: 80%;" type="text"/> ▼ |
| Military Service Start Date: | <input style="width: 40%;" type="text"/> 📅 End Date: <input style="width: 40%;" type="text"/> 📅 |
| Creditable Military Service: | <input style="width: 80%;" type="text"/> |
| | <input type="checkbox"/> Military Service Verified <input type="checkbox"/> Veterans Preference RIF |
| Effective Date: | 08/04/2009 📅 |
| Military Status: | (Invalid Value) ▼ |

Application Details page (6 of 6)

Note. The sections between the Education Level group box and the U.S. Federal group box vary depending on the content types in the system's primary person profile.

Applicant Name and **Applicant ID** These fields display identifying information about the applicant.

Page Elements for Performing Actions

Print Application Details Click to access the Print Application - Application Details page, which provides a printer-friendly format for the application data.

| | |
|--------------------------|---|
| Save and Continue | Click to save the application and continue entering information. |
| Save and Submit | Click to save and submit the application. the Add New Applicant page: Applications section appears and the application that you submitted appears in the Applications grid. |

Resume Text

Use this group box to attach an applicant's resume or copy the text of the resume into the Resume Text field.

| | |
|-------------------------------|--|
| Resume Title | Enter a title for the resume. This title identifies the application in the Applications grid on the Add New Applicant page: Applications section and the Manage Applicant page: Applicant Data tab: Applications section. |
| Language Code | Select the language in which the resume is written. |
| Resume Text | Enter or paste the text of the applicant's resume. Pasted text retains its original formatting. You can optionally format resume text using the provided formatting tools. |
| Printable Version | This link appears only if you enter resume text in the Resume Text field and submit the application. Click the link to access the Resume Text Printable Version page, where you can view and print the applicant's resume. |
| Add Resume Attachment | Click to browse for and upload a resume. After the resume is successfully attached, the View Resume Attachment field and the Delete Attachment button appears on the page and the system removes the Add Resume Attachment link from the page. |
| View Resume Attachment | Click the filename link to view the resume. The system opens the resume in a separate browser window. This field appears only after you attach a resume. If you delete the attached resume, the system removes this field from the page. |
| Delete Attachment | Click to delete an attached resume. This button appears only after you attach a resume. After you delete an attached resume, the Add Resume Attachment link appears and the system removes the View Resume Attachment and Delete Attachment options from the page. |

Attachments

Use this group box to attach additional files such as cover letters and transcripts. The fields in this group box do not appear until you add an attachment.

| | |
|------------------|--|
| File Name | 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 | <p>Select an attachment type.</p> <p>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.</p> <p>See Chapter 6, "Setting Up Additional Recruiting Definitions," Setting Up Application Attachments, page 97.</p> |
| Last Updated | Displays the date and time that the attachment entry was last modified. |
| Uploaded By | Displays the name of the user who uploaded the attachment. |
| Add Attachment | Click to browse for and upload an attachment. |
| Delete Attachment | Click to delete the selected attachments. |
| Preferences | |
| Desired Start Date | <p>Enter the date that the applicant would like to start working.</p> <p>This field can be used to screen applicants. It is compared to the Start Date field on the Job Opening page.</p> |
| Regular/Temporary | <p>Select <i>Regular</i> if the applicant is seeking a permanent job, <i>Temporary</i> if the applicant wants a temporary contract, or <i>Either</i> if the applicant is willing to consider both.</p> <p>This field can be used to screen applicants. It is compared to the Regular/Temporary field on the Job Opening page.</p> |
| Full/Part-Time | <p>Select either <i>Full-Time</i> or <i>Part-Time</i> if the applicant is seeking a particular type of job, or <i>Either</i> if the applicant is willing to consider both full-time and part-time jobs.</p> <p>This field can be used to screen applicants. It is compared to the Full/Part-Time field on the Job Opening page.</p> |
| Willing to Relocate | Select this check box if the applicant is willing to move to a new location. |
| Willing to Travel and Travel Percentage | <p>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.</p> <p>The Travel Percentage field can be used to screen applicants. It is compared to the Travel Percentage field on the Job Opening page.</p> |

Geographic Preference

First Choice and Second Choice Select the applicant's first and second location choices, if the applicant has expressed preferred locations for work.

The recruiting locations that appear in these prompts are those that are associated with the set ID for the business unit to which the user belongs. Recruiting locations are defined on the Recruiting Location page.

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

See [Chapter 6, "Setting Up Additional Recruiting Definitions," Defining Recruiting Locations, page 93.](#)

Comments Enter comments about an applicant's geographic preference. This is a free-format field so you can use this field to suit the needs of the organization. For example, you could use the field to indicate national regions, such as north or west, or international regions. The screening process does not evaluate these comments.

Desired Work Days

Select the check boxes next to the days that the applicant is willing to work.

Additional Preference Fields

Minimum Pay, Currency Code, and Pay Frequency Enter the applicant's minimum salary requirements, select the currency code, and specify the related unit in the Pay Frequency field.

For example, if the applicant will accept a pay rate of 70,000 CAD per year, enter *70,000* in the Minimum Pay field, select *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 per week that the applicant prefers to work.

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

Application Acknowledgement Letter

| | |
|----------------------------|---|
| Letter | <p>Select a letter template for generating a form letter to send to the applicant. The letters that are available for selection are those with the report definition HRS_APP_LET.</p> <p>See Chapter 19, "Managing Applicants," Sending Correspondence and Recruitment Letters, page 591.</p> |
| Date Letter Printed | <p>Displays the date that the letter was printed. The system automatically populates this field after you manually generate the letter or when the Print Recruitment Letters batch process prints the letter.</p> |
| Generate Letter | <p>Click this link to generate a letter using the selected letter template. The system opens the letter in a new window, where you can review it, save it locally, and optionally modify it. Once you generate a letter, you are responsible for printing and sending it; generating the letter removes it from the queue of the Print Recruitment Letters batch process.</p> <p>When you generate a letter, the system populates the Date Letter Printed field with the system date and adds the letter to the Contact History grid on the Manage Applicant page: Contact Notes tab.</p> <p>See Chapter 19, "Managing Applicants," Managing Contact Notes, page 575.</p> |

Job Families

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

Job Openings

Use this grid to link applicants to specific job openings.

| | |
|---|--|
| Job Opening ID and Job Description | <p>Select a job opening to associate with this job application. When you save the application, the applicant is linked to the job opening. If you use the delivered status processing, the applicant's initial disposition for the job opening is <i>Applied</i>.</p> <hr/> <p>Note. You cannot remove rows from this grid; linking an applicant to a job opening is permanent. If you linked an applicant to a job opening in error, change the applicant's disposition with regards to that job opening to <i>Withdrawn</i> or another appropriate value.</p> <hr/> |
|---|--|

View Questionnaire Click this link to view the completed online questionnaire for this job opening. The online questionnaire consists of any screening questions that are associated with the job opening.

The link appears only for job openings that are associated with screening questions, and the link is active only if the applicant has completed the questionnaire. Applicants complete questionnaires in Candidate Gateway, either when initially applying or after receiving a notification that there is an incomplete questionnaire that requires attention.

Add Job Opening Click this link to add a blank row to the Job Openings grid so that you can select another job opening to associate with this application.

Personal Information

(USF) Disability Code If the applicant is disabled, select the code that identifies the type of disability. Otherwise, select *No Handicap*. Define disability codes on the Handicap Table page.

Eligible to Work in U.S. Select *Yes* or *No* to indicate whether or not the applicant is eligible to work in the United States.

Are you a former employee Select *Yes* or *No* to indicate whether the applicant is a former employee. This setting is independent of the applicant type and employee ID that you enter on the Add Applicant Data page: Contact Details section.

Previous Termination Date If the applicant is a former employee, enter the applicant's last day worked, if known.

Referral Source

Use this group box to enter referral information for the applicant.

Source ID and Sub Source ID You can select Employee and Marketing type recruitment sources in the Source field. If subsources have been defined for the selected source, you can enter a subsourse as well.

If you use the Link Applicant to Job action to associate the application to another job opening, the referral information does not apply to the new job opening. However, if you use the Job Openings grid on this page to associate the application with another job opening, the referral information does apply to the additional job opening.

Specific Referral Source Enter additional information about the selected referral source.

Empl ID, Referral Name, and Applicant is a Family Member When you select an Employee type recruitment source, the system adds these fields so that you can enter additional information about the employee that referred the applicant.

See [Chapter 8, "Setting Up Recruitment Sources and Third Party Integrations," Setting Up Recruitment Sources, page 181.](#)

Work Experience

Use this grid to display and define the applicant's work experience.

Start Date and End Date Based on the start date and end date that you enter for each row in the grid, the system calculates the applicant's years of work experience. When there is no end date, the system calculates the years of work experience through the current date.

This information can be used to screen applicants. The calculated value is compared to the Years of Work Experience requirement entered in the Work Experience & Education matrix on the Job Opening page.

Note. When the screening process evaluates whether an applicant meets particular education & experience requirements, it fails applications where there are no work experience entries with start dates, even if there are zero years of work experience required.

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

Education Level

Highest Education Level Select the highest level of education attained by the applicant. Education levels are defined on the Content Item page using the content type *DEG*. (degree).

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

Training

Use this grid to list relevant training courses that the applicant has taken. For each course, enter the course title, the school name, and the course date. Click the Add Training link to add a blank row to the grid so that you can enter another training course.

<Profile Content Type>

Job applications include a separate grid for each profile content type in the system's primary person type profile. Grids appear alphabetically by content type code (which is different from the content type name that appears as the grid label).

Note. The exact configuration of these grids depends on how the content type is configured by the Manage Profiles business process.

See [Chapter 3, "Setting Up Profile Integration," page 25.](#)

- <Content Item Name>** In each content type grid, the first column displays the name of the specific content item that you added.
- For example, in the Competencies grid, the first column (labeled *Competencies*) displays a specific competency such as *Analytical Thinking*, while in the Degrees grid, the first column (labeled *Degrees*) displays a specific degree name such as *Bachelor of Arts*.
- To modify information about a content item that you have already added to the grid, click the value in this first column to access the corresponding detail page.
- <Additional Column Names>** The columns that appear in each grid depend on the settings in the Content Section Configuration page for the content type. Specifically, fields for which you select the Summary check box on the Content Section Configuration page appear as grid columns.
- Add <Content Item>** Click this link to access the content item detail page, where you enter specific content items (such as *Analytical Thinking* and *Bachelor of Arts*). The fields on the detail page depend on the content type definition within the Manage Profiles business process.
- Save the data on the detail page to add the content item to the grid.

Copy Limited Items from Job Opening

- Copy Limited Items from Job Opening** Click this button to add certain content items from the job openings that are associated with the application. The system copies job opening content items for the content types that are configured such that applicants cannot add content items. Specifically, these are the content types where the Applicant May Add Items check box is not selected on the Content Type Configuration page.
- For example, the delivered content type configuration for competencies prevents applicants from adding competencies to their applications. The assumption is that you want to rate applicants on specific job-related competencies that you have defined in the job opening. To facilitate data entry, and to ensure that you rate applicants on the correct set of competencies, you click the Copy Limited Items from Job Opening button. If there are any competencies that are associated with the job openings listed in the application, the system copies those competencies to the application so that you can enter applicant-specific ratings.

(USF) Priority Placement

Use this grid to enter priority placement codes for the applicant. This information, along with the salary grade and level, is used by the Priority Placement process to identify applicants who should be considered as a candidate for a specific job opening. This information is compared to the priority placement codes and salary information entered on the Job Opening page.

- Add Priority Placement and 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 | Enter the applicant's highest pay plan or grade. |
| Minimum Acceptable Pay Plan and Minimum Acceptable Grade | Select the minimum pay plan and 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 <i>Conditional</i> , <i>Indefinite</i> , <i>None</i> , and <i>Permanent</i> . |
| Veterans Preference | Select the veterans hiring preference that applies. Veterans preference values are defined on the Setup Veterans Preference page. |
| Reserve Category | Select the employee's reserve category, or select <i>Not Applicable</i> . |
| Uniformed Service | Select the type of uniformed service in which this veteran served. Values are: <i>Air Force</i> , <i>Army</i> , <i>Coast Guard</i> , <i>Marines</i> , and <i>Navy</i> . |
| Military Grade | Select the veterans military grade. |
| Military Separation Status | Select the veterans military separation status. |
| Military Service Start Date and End Date | Enter the applicant's military service dates. |
| Creditable Military Service | Enter the amount of military service for which the applicant receives credit. |
| Military Service Verified | Select this check box if you have verified the applicant's military service. |
| Effective Date | Enter the effective date for the applicant's military status. |
| Military Status | Select the applicant's military status. This field can be used to screen applicants. This field is compared to the Draft Status field on the Job Opening page. |


Entering Content Item Details


Access the Add <Content Type> page (click the Add <content type> link on the Add Application Data page).


Add Competencies

Details


*Competency: 


*Evaluation Type: 


Reviewer ID: 


EmplID: 

Appraisal ID:

*Rating Model:  Competency Management Scale

*Proficiency: 

Interest Level: 

Verified By: 


Year Last Used:


Year Acquired:


Years Of Experience:


Reviewer Is Approved

Review Active

Review Date: 

Description: 












Reviewer: 

Long Description: 

Example 1: Add Competencies page

Add Degrees

Details

| | | |
|----------------------------|---|---|
| *Degree: | <input type="text"/> |  |
| Major Code: | <input type="text"/> |  |
| Major Description: | <input type="text"/> | |
| Country: | <input type="text"/> |  |
| State: | <input type="text"/> |  |
| School Code: | <input type="text"/> |  |
| School Description: | <input type="text"/> | |
| | <input type="checkbox"/> Minority Institution | |
| Minor Code: | <input type="text"/> |  |
| Minor Description: | <input type="text"/> | |
| Average Grade: | <input type="text"/> | |
| | ▶  Germany | |
| | ▶  Australia | |
| | ▶  Japan | |
| | ▶  US Federal | |
| | ▶  French Public Sector | |
| Year Acquired: | <input type="text"/> | |
| GPA: | <input type="text"/> | |
| | <input type="checkbox"/> Graduated | |
| | <input type="checkbox"/> Terminal Degree for Discipline | |
| Educator: | <input type="text"/> | |

Example 2: Degrees page

The fields on the content type detail pages depend on the content type configuration in the Manage Profiles business process.

Apply and Add Another Click this button to save the current content item information to the application and clear the page so that you can enter information about a new content item.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles, "Setting Up the Content Catalog"

Entering References

This section discusses how to:

- Review and request references.
- Enter reference details.

Pages Used to Enter References

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|---|------------------------|--|--|
| Add New Applicant page: Verification section Manage Applicant page: Applicant Data tab: Verification section | HRS_ADD_APPLICANT | <ul style="list-style-type: none"> • Recruiting, Add New Applicant, Add New Applicant Access the Verification section. • Recruiting, Find Applicants, Find Applicants Click an applicant name to access the Manage Applicant page, then access the Applicant Data tab: Verification section. | Review references for an applicant, and add and edit references. |
| Add Reference Details Edit Reference Details | HRS_APP_REF_SEC | Click the Add Reference link or the Edit Reference link on the Add New Applicant page: Verification section. | Add or edit reference information. |

Reviewing and Requesting References

Access the Add New Applicant page: Verification section (select Recruiting, Add New Applicant, Add New Applicant, then click the Verification link).



Add New Applicant page: Verification section

References

Use this group box to view the name of each reference, their title, and their employer.

Add Reference Click to access the Add Reference Details page, where you can enter new reference information for the applicant.

Edit References Click to access the Edit Reference Details page, where you can edit existing reference information for the applicant.

Request Reference Click to send a request for references email notification (HRS_UPDATE_REFERENCES) to the applicant. 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 9.1 PeopleBook*, "Using Candidate Gateway."

Use the message catalog to modify the message.

Entering Reference Details



Access the Add Reference Details page (click the Add Reference link or the Edit Reference link on the Add New Applicant page: Verification section).

Manage Applicant:

Add Reference Details

Reference Details


Reference Number: 1

*Date Contacted:  *Reference Type: 

Reference Name:


Title:

Employer:

Country: 

Address:

Country Code: Contact Phone:

Comment: 

Add Reference Details page

Enter information about the person who provided the reference, then use the Comments field to record your notes.

Entering Applicant Eligibility and Identity Information

This section discusses how to add eligibility and identity information.

Pages Used to Enter Applicant Eligibility and Identity Information

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|--|------------------------|---|--|
| Add New Applicant page: Eligibility & Identity section Manage Applicant page: Applicant Data tab: Eligibility & Identity section | HRS_ADD_APPLICANT | <ul style="list-style-type: none"> Recruiting, Add New Applicant, Add New Applicant <p>Access the Eligibility & Identity section.</p> <ul style="list-style-type: none"> Recruiting, Find Applicants, Find Applicants <p>Click an applicant name to access the Manage Applicant page, then access the Applicant Data tab: Eligibility & Identity section.</p> | Enter eligibility and identity information for an applicant. |
| Add National ID Edit National ID | HRS_APP_NID | Click the Add National Identification link or the Edit National ID link on the Add New Applicant page: Eligibility & Identity section. | Enter national ID information for an applicant. |
| Add Citizenship Edit Citizenship | HRS_APP_CIT_PSP1 | Click the Add Citizenship link or the Edit Citizenship Details link on the Add New Applicant page: Eligibility & Identity section. | Enter citizenship information for an applicant. |
| Add Visa Permit Details Edit Visa Permit Details | HRS_APP_VSA_PMT1 | Click the Add Visa Permit link or the Edit Visa Permit Details link on the Add New Applicant page: Eligibility & Identity section. | Enter visa permit information for an applicant. |
| Add Bank Account Edit Bank Account | HRS_APP_BANKACCT | Click the Add Bank Account link or the Edit Bank Account link on the Add New Applicant page: Eligibility & Identity section. | Enter bank account information for an applicant. |

Adding Eligibility and Identity Information

Access the Add New Applicant page: Eligibility & Identity section (select Recruiting, Add New Applicant, Add New Applicant, then click the Eligibility & Identity link).

Add New Applicant

[Add Applicant](#)
 [Save](#)
[Manage Applicant Activity](#)

[Contact Details](#)
|
[Applications](#)
|
[Verification](#)
|
[Eligibility & Identity](#)

Personal Information

| | | | | |
|----------------|--------------------------------------|--|------------------|--|
| Date of Birth: | <input type="text"/> | | *Marital Status: | <input type="text" value="Unknown"/> |
| *Gender: | <input type="text" value="Unknown"/> | | Ethnic Group: | <input type="text" value="Not Indicated"/> |

- [Canada](#)
- [Switzerland](#)
- [Germany](#)
- [Spain](#)
- [France](#)
- [United Kingdom](#)
- [Italy](#)
- [Japan](#)
- [USA](#)
- [Australia](#)
- [Malaysia](#)
- [New Zealand](#)
- [Singapore](#)

Add New Applicant page: Eligibility & Identity section (1 of 3)

| |
|--|
| National Identification |
| No National Identification has been added to this applicant's profile. |
| + Add National Identification |
| Citizenship |
| No Citizenship has been added to this applicant's profile. |
| + Add Citizenship |
| Visa Permit |
| No Visa Permit has been added to this applicant's profile. |
| + Add Visa Permit |
| Bank Account |
| No Bank Account has been added to this applicant's profile. |
| + Add Bank Account |

Add New Applicant page: Eligibility & Identity section (2 of 3)

| |
|--|
| Applicant Disability |
| <input type="checkbox"/> Disabled |
|  Switzerland |
|  Germany |
|  Spain |
|  France |
|  Italy |
|  Japan |
|  Netherlands |
|  United Kingdom |
|  USA |
|  New Zealand |
|  Brazil |

Add New Applicant page: Eligibility & Identity section (3 of 3)

Personal Information

Use this group box to enter date of birth, gender, marital status, ethnic group, 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.

Country-Specific Personal Information

Enter additional country-specific information for applicants. Entering citizenship information for an applicant is similar to entering citizenship information for an employee.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Adding a Person in PeopleSoft Human Resources," Entering Country-Specific Person Data.

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

National Identification

Add National Identification and Edit National Id

Click to access the National ID page, where you can enter new or edit existing national ID information for the applicant. Entering national ID information for an applicant is similar to entering national ID information for an employee.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Adding a Person in PeopleSoft Human Resources," National ID.

Citizenship

Add Citizenship and Edit Citizenship Details

Click to access the Citizenship page, where you can enter new or edit existing citizenship information for the applicant. Entering citizenship information for an applicant is similar to entering citizenship information for an employee.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Entering Additional Data in Human Resources Records," Tracking Employee Passport and Citizenship Information.

Visa Permit

Add Visa Permit and Edit Visa Permit Details

Click to access the Visa Permit Details page, where you can enter new or edit existing visa permit details. Entering visa information for an applicant is similar to entering visa information for an employee.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Entering Additional Data in Human Resources Records," Entering an Employee's Visa or Permit Information.

Bank Accounts

Add Bank Account and **Edit Bank Account** Click to access the Bank Account page, where you can enter new or edit existing bank account information for the applicant. Entering bank account information for an applicant is similar to entering bank account information for an employee.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Entering Additional Data in Human Resources Records," Recording a Person's Bank Account Information.

Applicant Disability

Use this group box to enter country-specific disability information. Entering disability information for an applicant is similar to entering disability information for an employee.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Entering Additional Data in Human Resources Records," Entering Disability Information.

Accommodation Request

Use this group box to enter accommodation requests for an applicant with a disability. Entering accommodation requests for an applicant is similar to entering accommodation requests for an employee.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Meet Regulatory Requirements*, "(GBR, USA, and USF) Meeting Disability Regulatory Requirements," Entering Accommodation Requests.

Accommodation Options

Use this group box to enter accommodation options for an applicant with a disability. Entering accommodation options for an applicant is similar to entering accommodation options for an employee.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Meet Regulatory Requirements*, "(GBR, USA, and USF) Meeting Disability Regulatory Requirements," Entering Accommodation Options.

Chapter 12

Searching for Applicants

This chapter provides an overview of applicant searches and discusses how to:

- Build Verity search collections.
- Perform applicant and profile searches.
- Work with saved searches

Understanding Applicant Searches

The Find Applicant page enables you to perform these types of searches:

- Applicant Search

This is a basic database search that looks for selected values in specific applicant data fields. It does not search any job application fields (other than the date the application was received). Rather, it searches non-application data such as the applicant status, type, disposition, and so forth. This search is not suitable for finding applicants with specific qualifications.

- Resume and Application Search

This search uses the Verity search engine to search for keywords in applicant resumes. The only available search criteria are the keywords and a date since which the application must have been received.

The system searches for the keywords in both resume attachment files and resumes that are entered online. It does *not* look at any other application data.

- Advanced Keyword Search

This search uses the Verity search engine to find applicants that meet your criteria. This search enables you to search for keywords in a resume and to search application data, including profile data such as competencies and other qualifications. If you have enabled profile integration on the Recruiting Installation – General page, you can populate qualification-related search criteria fields by copying content from a profile you choose.

- Profile Match

This search uses the Verity search engine to match applicants, employees, job openings, and non-persons based on their profile data. For example, to find candidates for a job opening, you could search for applicants and employees with profiles that match the job opening profile. You can similarly search for suitable job openings for a particular applicant or applicants who are similar to a particular employee.

When you perform a profile match, you do not choose which profile content to search for. Instead, the system considers all content that is associated with the profile.

Note. When you use a profile match search to search for employees who match a job opening, the system provides an option to generate email suggesting to selected employees that they apply for the job opening. Until the employee applies, there is no applicant record for the employee, and you cannot perform any recruiting actions related to the employee.

- AIRS Oxygen search

If you have licensed and implemented AIRS Oxygen, a web-based tool that searches various locations on the internet for applicant information, the Find Applicant page also includes an AIRS logo that you click to perform an AIRS search. AIRS Oxygen is licensed separately and solely by AIRS. If you wish to license an AIRS product you must contact AIRS.

When you initially access the Find Applicants page, it includes group boxes for performing either an Applicant Search or a Resume and Application search. It also includes links that you use to switch the page into Advanced Keyword Search mode or Profile Match mode.

When the Find Applicants page is in its initial state, performing an Applicant Search removes the page elements related to the Resume and Application search. Performing a Resume and Keyword search (which is essentially a subset of the Advanced Keyword Search) changes the page into Advanced Keyword Search mode.

Building Search Collections for Applicant Searches

This section provides an overview of search collections and discusses how to:

- Build applicant search collections.
- Build additional collections for profile match searching.

Understanding Search Collections

Talent Acquisition Manager uses the Verity search engine in the keyword and resume search, the advanced applicant search, and for profile matching. For a search to be successful, there must be a Verity search collection that contains the searchable data. There are various Verity search collections that you need to build.

Important! Verity searches only access data that is in the collection; they do not access the PeopleSoft database directly. Therefore, it is critical to update your collections frequently.

Search Collection Summary

The following table summarizes the collections that are used for each type of applicant search:

| Search Type | Collections Used | Reference |
|---------------------------|--|---|
| Applicant Search | None; this is a database search. | See Chapter 12, "Searching for Applicants," Performing Basic Database Searches, page 350. |
| Keyword and Resume Search | Application and resume collection. | See Chapter 12, "Searching for Applicants," Performing Simple Keyword Searches, page 354. |
| Advanced Keyword Search | Application and resume collection. | See Chapter 12, "Searching for Applicants," Performing Advanced Keyword Searches, page 358. |
| Profile Match | There are four types of profiles that can be searched; each type of profile has its own collection or collections: Applicant profile collection. Job opening profile collection. Person profile collection (for employees). Nonperson profile collections. | See Chapter 12, "Searching for Applicants," Performing Profile Searches, page 363. |

Note. This table lists only applicant searches. There are additional searches in Talent Acquisition Manager and Candidate Gateway that use the job opening collections; these are discussed elsewhere.

See [Chapter 18, "Managing Job Postings," page 541.](#)

Applicant Collections

To create the applicant collections, run the Verity Applicant Index Build (HRS_SRCH_IDX) Application Engine process. This process, in turn, runs the build search index (HRS_SRCH_APP) process to actually build the collections.

The two collections that contain applicant data are:

- The application and resume collection.

This collection contains applicant data, including resume text, that you can search using the keyword and resume search or the advanced applicant search. It also contains applicant profile items as text: for example *0100 Abstract thinking* within the content section *COMPETENCY*.

- The applicant profile collection.

This collection contains applicant profile data (such as competencies) that you can search using the Profile Match search.

The Verity Applicant Index Build process creates this collection only if profile utilization is active (on the Recruiting Installation - General page, the Allow Profile Utilization field value is *Yes*.)

The applicant profile collection contains codes within a dynamically generated nested structure representing different profile attributes: for example, *0100* within the item property *JPM_CAT_ITEM_ID* within the content item *ITEM_0100* within the content section *SECTION_COMPETENCY*

Job Posting Collections

To create the job posting collections, run the Verity Job Posting Index Build (HRS_JSCH_IDX) Application Engine process. This process creates two collections that contain data for posted job openings.

- The job posting collection.

This collection is not used for applicant searches. It contains job opening data, and it contains job profile items as text (for example *CIRM Integrated Resource Management* within the content section *LIC* (licenses).

and is used for job posting searches in both Candidate Gateway and Talent Acquisition Manager.

- The job opening profile collection.

This collection contains job opening profile data (such as competencies) that you can use when searching for applicants using the Profile Match search. It is also used in Candidate Gateway, where internal applicants (but *not* external applicants) can search for job openings that match their own person, job, or interest profiles.

The Verity Job Posting Index Build process creates this collection only if profile utilization is active (on the Recruiting Installation - General page, the Allow Profile Utilization field value is *Yes*.)

The job opening profile collection contains codes within a dynamically generated nested structure representing different profile attributes: for example, *N* within the item property *JPM_YN_2* within the content item *ITEM_CIRM* within the content section *SECTION_LIC*.

Important! Although the data in these collections comes from the entire job opening rather than from just the job posting, these collections are called the job posting collections because they include only data from posted job openings.

See [Chapter 18, "Managing Job Postings," Building the Job Posting Collections, page 541.](#)

Person and Non-Person Profile Collections

These collections contain person and non-person profile data that you can search using the Profile Match search. These collections do not include profile data for applicants or job openings.

To create these collections, you need to run two processes:

- First, run the Build Manager List (JPM_DR_UNLD) Application Engine process to create the management reporting structure.

The system uses this information when building the profile search collections to give managers access to the profiles of their direct reports.

- Next, run the Maintain Profile Indexes (JPM_BLD_INDX) Application Engine process, which actually creates the collections.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles*, "Setting Up Search and Compare Profiles."

Pages Used to Build Search Collections

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|-----------------------|------------------------|--|---|
| Build Applicant Index | HRS_SRCH_RUN_INDEX | Recruiting, Administration, Build Applicant Index, Build Applicant Index | Build the application and resume collection and the applicant profile collection by running the Verity Applicant Index Build (HRS_SRCH_IDX) Application Engine process, which then runs the build search index (HRS_SRCH_APP) process to actually build the collections. Note. The applicant profile collection is created only if profile utilization is active. |
| Build Job Index | HRS_JSCH_RUN_PROC | Recruiting, Administration, Build Job Index, Build Job Index | Build the job posting collection and the job opening profile collection by running the Verity Job Posting Index Build (HRS_JSCH_IDX) Application Engine process. Note. The job opening profile collection is created only if profile utilization is active. See Chapter 18, "Managing Job Postings," Building the Job Posting Collections, page 541. |

| Page Name | Definition Name | Navigation | Usage |
|--------------------------|------------------------|--|---|
| Build Manager List | RUNCTL_JPM_DR | Set Up HRMS, Product Related, Profile Management, Profiles, Build Manager List, Build Manager List | Build the manager list by running the Build Manager List (JPM_DR_UNLD) Application Engine process. <i>See PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles, "Setting Up Search and Compare Profiles," Running the Build Manager List Process.</i> |
| Maintain Profile Indexes | RUNCTL_JPM_INDX | Set Up HRMS, Product Related, Profile Management, Profiles, Maintain Profile Indexes, Maintain Profile Indexes | Build the person and non-person profile collections by running the Maintain Profile Indexes (JPM_BLD_INDX) Application Engine process. <i>See PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles, "Setting Up Search and Compare Profiles," Running the Maintain Profile Indexes Process.</i> |

Building Applicant Search Collections

Access the Build Applicant Index page (Recruiting, Administration, Build Applicant Index).




Build Applicant Index

Run Control ID: PS [Report Manager](#) [Process Monitor](#)

Resume Search Collection

Create New Collection From Application Date: 

Update Existing Collection

Applicant Status to be Indexed [Customize](#) | [Find](#) |  | [First](#)  1-4 of 4  [Last](#)

| Select | Description |
|-------------------------------------|--------------|
| <input checked="" type="checkbox"/> | 010 Active |
| <input checked="" type="checkbox"/> | 020 Hired |
| <input checked="" type="checkbox"/> | 030 Inactive |
| <input checked="" type="checkbox"/> | 040 Queued |

Enter directory for storing resume attachments temporarily for this process. There should be enough space to hold all resume attachments e.g. c:\temp.

Leave segment size blank or for high volume situations enter the segment size in number of days. For example, suppose your company receives 100 resumes per day over a 6 month period. Your company is equipped 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.

Attachment Temp Directory:

Segment Size:

Build Applicant Index page

Resume Search Collection

This process run in two modes.

Create New Select this option to build new collections. The new collections include applications that have been submitted on or since the date that you enter in the From Application Date field.

Update Existing Select this option to add, update, and delete entries in the existing collections.

From Application Date When the system builds or updates the applicant collections, it includes applications that were submitted on or since the date you enter in this field. If you leave this field blank, all applications are included in the collections.

Applicant Status to be Indexed

Select and Description Select which applicant statuses to include in the Verity search collection. You must select at least one status before you can build or update the collection. The selection grid shows all statuses that have been defined for the Applicant recruitment area. The four statuses that PeopleSoft delivers are Active, Hired, Inactive, and Queued.

Only applicants who are included in the collection are searchable using the Resume and Applicant search, the Advanced Keyword search, or the Profile Match search.

Applicant who are not included in the collection are still searchable using the Applicant Search (the database search for applicants). If you want consistency among all types of searches, you can include all available statuses in the collection. However, when there are large numbers of applicants in the system, you can improve the performance of Verity searches by including fewer applicants (for example, only active applicants).

Note. The Advanced Keyword Search gives users the option to exclude selected statuses from search results. The list of statuses that appears on the Advanced Keyword Search page include all statuses, not just the ones that you included in the collection.

Additional Page Elements

Attachment Temp Directory (attachment temporary directory) Enter a directory where the system can temporarily store resume attachments while building the applicant and resume collection. Be sure there is enough space to hold all resume attachments

This path is relative to the PeopleSoft Process Scheduler that is running the process. Make sure that the Process Scheduler's login has read/write access to this directory.

Resumes stored in this temporary directory are not deleted after the Build Applicant Index process is run. This improves performance because the system does not need to copy the resumes to the temporary directory each time you run the process. If you want to delete the resumes, you must do so manually.

Segment Size

Segment size accommodates situations where a high volume of applicant data needs to be indexed; you can leave this field blank if you are not processing a high volume of applications.

If you enter a segment size, the application data is split into multiple collections, or segments.

The value that you enter represents the number of days worth of data to be included in each collection. A smaller segment size will result in more collections for a given set of data and a larger segment size gives fewer collections.

Segmenting is useful in high data volume situations where a multi-processor machine is available. It reduces the amount of time it takes to build the applicant collections on such hardware.

Choice of an effective segment size depends on several factors including expected number and distribution of incoming applications. When making this decision some analysis of the expected mean distribution of incoming applications is required. For example, if you expect to receive approximately 100 resumes per day over a 6-month period, and your analysis suggests a segment size of 20 days, then approximately (100 x 20) applications are indexed per index collection. For the six month period, the number of collections is the total number of days in the period divided by 20.

Building Additional Collections for Profile Match Searching

To create the job posting collections, including the job opening profile collection, access the Build Job Index page (Recruiting, Administration, Build Job Index, Build Job Index).

See [Chapter 18, "Managing Job Postings," Building the Job Posting Collections, page 541](#).

To build the manager list before creating the person and non-person profile collections, access the Build Manager List page (Set Up HRMS, Product Related, Profile Management, Profiles, Build Manager List, Build Manager List).

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles*, "Setting Up Search and Compare Profiles," Running the Build Manager List Process.

To create the person and non-person profile collections, access the Maintain Profile Indexes page (Set Up HRMS, Product Related, Profile Management, Profiles, Maintain Profile Indexes, Maintain Profile Indexes).

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles*, "Setting Up Search and Compare Profiles," Running the Maintain Profile Indexes Process.

Performing Applicant and Profile Searches

This section provides an overview of profile-based searching in the advanced keyword search, lists common elements used to search for applicants, and discusses how to:

- Perform basic database searches.

- Perform simple keyword searches.
- Perform advanced keyword searches.
- Perform profile searches.
- Review profile match details.
- Use AIRS to search the internet for applicants.

Understanding Profile-Based Searching in the Advanced Keyword Search

The advanced keyword search offers several search criteria fields that you use to search for particular qualifications. Because Talent Acquisition Manager uses profiles to store applicant qualifications, the specific search fields that appear vary depending on how profiles have been configured for the recruiting process.

Only profile content types that you have configured for use in recruiting (on the Content Section Configuration page) are available for searching. This is a subset of the content types in the primary person profile type that you define using the Manage Profiles business process in PeopleSoft Enterprise Human Resources.

See [Chapter 3, "Setting Up Profile Integration," page 25](#).

When you enter search criteria, you can optionally select a job opening ID, an employee ID, or a non-person profile ID whose primary profile is to be used as the basis for the applicant search. If you select one of these profile types, the system copies profile content items (specific qualifications, such as a specific competency or a specific degree) into the corresponding search fields so that you can search for applicants with matching qualifications.

Additionally, the system hides any profile-based search fields that are not part of the selected profile.

Common Elements Used to Search for Applicants

| | |
|------------------------|--|
| AIRS | Click this graphic to use AIRS Oxygen to search the internet for applicants. This link appears only in systems that have been set up to integrate with AIRS Oxygen. See Chapter 12, "Searching for Applicants," Using AIRS to Search the Internet for Applicants, page 368. |
| Advanced Search | Click to display the Find Applicants page in advanced search mode, which enables you to search the Verity collection using both specific criteria and keywords. |
| Basic Search | Click this link to return the Find Applicants page to its initial mode, which displays fields for performing databases searches and simple keyword searches. |
| Profile Match | Click to display the Recruitment Profile Match page, where you can search for applicant, employee, job opening, and non-person profiles that match a specific applicant, employee, job opening, and non-person profiles. |

Return to Find Applicants

Click to return the Find Applicants page to its initial mode, which displays fields for performing database searches and simple keyword searches.

Search My Applicants

Select this check box if you want to see only the applicants that are attached to job openings where you are either the originator or part of the hiring team. Applicants that you enter into the system are not considered your applicants unless they are associated with one of your job openings.

If the check box is not selected, the system looks at all applicants that match your search criteria.

This check box is not available for profile match searches.

Search Tips

Click to access the Search Tips page, which displays information about how to construct keyword searches. For example, the page explains how to perform wildcard searches.

Pages Used to Search for Applicants

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|------------------------------|---|---|--|
| Find Applicants | HRS_REC_SCHAPP | Recruiting, Find Applicants, Find Applicants | Perform all types of searches (database searches, simple keyword searches, advanced keyword searches, and profile searches), review search results, access detailed information for specific applicants, and perform specific predefined actions on selected applicants. |
| Recruitment Profile Match | HRS_REC_SCHAPP | Click the Profile Match link on the Find Applicants page. | Search for applicant, employee, job opening, or non-person profiles that match a specific applicant, employee, job opening, or non-person profile. |
| Compare Results Match Result | HRS_COMPARE_RESULT HRS_COMPARE_RSLT2 | Click the Compare button on the Recruitment Profile Match page. | Review a detailed profile comparison. The page always displays the profile that you were trying to match; you select rows from the search results to compare to that profile. There are two versions of this page: a standard version, and a version that appears in accessible mode. |

| Page Name | Definition Name | Navigation | Usage |
|------------------|------------------------|---|---|
| Search Tips | HRS_REC_SRCH_TIPS | Click the Search Tips link on the Find Applicants page. | View tips for constructing keyword searches. For example, the search tips provide information on the use of <i>and</i> and <i>or</i> in searches and on searching for entire phrases. |


Performing Basic Database Searches

Access the Find Applicants page (Recruiting, Find Applicants, Find Applicants).

Find Applicants

Applicant Search


Search My Applicants


Job Opening ID: 


Applicant ID:


First Name:



Last Name:


Applicant Status: 

Applicant Type: 


Disposition: 

Applied Within: 


Applied Between:  And: 

Saved Resume and Applicant Search: 

Resume and Application Search

Enter Keywords: Application received: 

[Advanced Search](#) [Profile Match](#) [Search Tips](#)



Find Applicants page as it appears before searching

The screenshot shows the 'Find Applicants' interface. At the top, there is a search bar with a dropdown menu labeled 'Select Search...' and a 'Find Applicants' button. Below this is a section titled 'View Applicant Search Criteria' which is collapsed. A green checkmark and the text '1 Results Found' are displayed. The main area is a table titled 'Search Results' with columns: Select, Applicant, Applicant ID, Job Opening, Disposition, Resume, Application, and *Take Action. The table contains one row for Rodney Clarke (Applicant ID 100202) with a job opening of 'Web Developer-10224' and a disposition of '070 Offer'. Below the table are links for 'Select All' and 'Deselect All', a '*Group Action:' dropdown menu, and a 'Go' button. At the bottom left is a link 'Return to Find Applicants' and at the bottom right is the AIRS logo.

Find Applicants page as it appears after performing a database search

Note. When you first access the Find Applicants page, it displays the Applicant Search group box for database searches and the Resume and Application Search group box for simple keyword searches. After you perform a database search, the search results appear and the Resume and Application search section is hidden. After you perform a Resume and Application search, the page changes to advanced search mode.

Applicant Search

Use the Applicant Search group box to enter criteria. After you perform a search, this section is hidden within a collapsed section titled View Applicant Search Criteria. You can expand the section to modify your search criteria and perform another database search.

Find Applicants

Click this link to initiate the search. After you click this button, the page changes to show only fields that are applicable to the search you performed:

- Search results appear, along with the page elements that you use to initiate actions for specific rows in the search results grid.
- The Resume and Application Search section is hidden (although the field for selecting a saved Resume and Applicant Search remains visible).
- The Advanced Search and Profile Match links are hidden.

Click the Return to Find Applicants link to return the page to its original pre-search state.

Reset Search

Click this link to deselect the search criteria fields. If the Search My Applicants check box is selected, resetting the search criteria does not deselect it.

After resetting your search criteria, you must enter criteria in at least one field before you can perform another search.

Search My Applicants Select this check box if you want to see only the applicants that are attached to job openings where you are either the originator or part of the hiring team. Applicants that you enter into the system are not considered your applicants unless they are associated with one of your job openings.

If the check box is not selected, the system looks at all applicants that match your search criteria.

Job Opening ID When you enter a job opening ID, the search results include only applicants who are associated with that job opening.

Search Results

Because the database search does not use the Verity search collection, this search always applies to all applicants in the system.

Search results can show multiple rows for applicants who have applied for more than one job opening (each job opening appears in a separate row in the search results). The search results can also include rows for applications that are not associated with any job openings.

Select Select this check box to identify rows to be included in any group action that you perform on this page.

Applicant and Applicant ID Displays the applicant's name and ID. The applicant's name is a link that you click to access the Manage Applicant page.

Job Opening Displays either *No Job Opening Selected* or the primary posting title of the job opening that is associated with the application. Click a posting title to access the Job Opening page.

Disposition Displays applicant's current disposition for the job opening. The values are the statuses that have been defined for the Recruitment Summary status area.

Click this link to access the Disposition Details page. The exact title and content of the Disposition Details page depends on the applicant's status.

Resume Click to open a new window that displays the applicant's resume.

- If the resume is an attachment, the file opens in the new window.
- If the resume was entered into the Resume Text field in the application, the new window displays the Applicant Resume page.
- If no resume exists for a particular applicant (for example, the applicant instead completed the work experience fields in the online application), then this column is blank.

If none of the applicants in the grid have resumes, the entire Resume column is hidden.

Application Click to open a new window that displays the Application Details page, where you can review the applicant's complete job application.

Take Action

Select an action you want to take for the selected applicant. The system automatically initiates the action and accesses the appropriate page.

In this context, the following actions are available: *Add Applicant to New List, Add Applicant to Saved List, Change Applicant Status, Create Interview Evaluation, Create Salary Package Model, Forward Applicant, Link Applicant to Job, Manage Applicant Checklist, Manage Interviews, Prepare For Hire, Prepare Job Offer, Print Application Details, Reject Applicant, Route Applicant, and Send Correspondence.*

See [Chapter 19, "Managing Applicants," Actions in the Take Action Field, page 559.](#)

Select Group Action and Go

Select an action to be performed on all selected applicants. Unlike actions performed on a single applicant using the Take Action field, the system does not perform the action immediately. Instead, you must click the Go button to initiate the selected action.

The actions available as group actions are a subset of the actions that you can perform on individual applicants. These are the actions that you can *not* perform on a group: *Create Interview Evaluation, Create Salary Package Model, Manage Applicant Checklist, Prepare for Hire, and Prepare Job Offer.*


Performing Simple Keyword Searches

Access the Find Applicants page (Recruiting, Find Applicants, Find Applicants).

Find Applicants

Applicant Search

Search My Applicants

Job Opening ID: 

Applicant ID:

First Name:



Last Name:

Applicant Status:

Applicant Type:

Disposition:

Applied Within:


Applied Between:  And: 

Saved Resume and Applicant Search:

Resume and Application Search

Enter Keywords: Application received:

[Advanced Search](#) [Profile Match](#) [Search Tips](#)



Find Applicants page as it appears before searching

Find Applicants

Saved Resume and Applicant Search:

View Resume and Application Search criteria

3 Results Found

Navigation: First Previous Next Last

| Select | Score | Applicant | Applicant ID | Type | Date Applied | Resume | Application | Former Employee | Take Action |
|--------------------------|-------|--------------------------------|--------------|------|--------------|--------|-------------|-----------------|------------------|
| <input type="checkbox"/> | 77% | Rodney Clarke | 100202 | Ext | 03/19/2006 | | | | Select Action... |
| <input type="checkbox"/> | 77% | Lok Tsui | 305 | Ext | 05/02/2001 | | | | Select Action... |
| <input type="checkbox"/> | 77% | Samuel Biddles | 42 | Ext | 02/15/2001 | | | | Select Action... |

Navigation: First Previous Next Last

Select All Deselect All Group Action:

[Return to Find Applicants](#)

AIRS

Find Applicants page as it appears after performing a keyword search

Note. When you first access the Find Applicants page, it displays the Applicant Search group box for database searches and the Resume and Application Search group box for simple keyword searches. After you perform a Resume and Application search, the page changes to advanced search mode.

Find Applicants Click to perform the search.

Page Elements for Saved Searches

Saved Resume and Applicant Search Select a saved search, then click the Find Applicants button to perform the search.

This list of available saved searches includes public searches, as well as private searches that you created.

See Chapter 12, "Searching for Applicants," Working With Saved Searches, page 369.

Save Search Click to save your search criteria.

Save for Compliance Click this button, which appears below the search results after you perform a search, to save the search results (not the search criteria) for auditing and statutory reporting purposes. There is a setting on the Recruiting Installation - Jobs page that can force saving when the search criteria includes a job opening.

See [Chapter 12, "Searching for Applicants," Understanding Applicant Searches, page 339](#) and [Chapter 2, "Defining Installation Options for Recruiting," Defining Job-Related Settings, page 15](#).

Resume and Application Search

When the Find Applicants page is in its initial mode, use the Resume and Application Search section to enter criteria for a keyword search. After you perform a keyword search, the page changes to advanced search mode. The advanced search criteria fields are initially hidden within a collapsed section titled View Resume and Application Search Criteria. You can expand the section to perform another search using the advanced search criteria fields, or you can click the Return to Find Applicants link to access the Find Applicants page in its initial mode.

Enter Keywords Enter any words or phrases that you want the system to look for in applicant's resumes. The system searches both resume text that has been entered in the database and external resume attachments. It does not search any other application data.

Application received To limit the search to applications that were received within a specific time frame, select one of these time frames: *Within Last Day*, *Within Last Week*, *Within Last Month*, *Within Last Year*, and *Anytime*.

Search Results

When you perform a keyword search, the system searches the Verity search collection. Because the collection can be built to include only applicants with specific statuses, the search results might include only a subset of the applicants in the database.

The search results grid for a keyword search contains some of the same information as the results of a database search along with these additional fields:

Score Displays a score that represents how closely the application matches your search criteria. The Verity search engine assigns this score.

Type Possible applicant types are *Emp* (employee), *Ext* (external applicant), or *Oth* (other).

The *Oth* value appears when the applicant type is *Non-Employee*, a value generally used for applicants who, although not current employees, already have data in the PeopleSoft HCM system.

Date Applied Displays the date that this application was originally saved to the system.

Former Employee

Displays a person icon if the applicant is a former employee. This information is *not* validated by the system; the applicant or recruiter who entered the application into the system manually sets this value.

If the applicant is not a former employee, then this column is blank. If none of the applicants in the grid are former employees, the entire column is hidden.

Performing Advanced Keyword Searches

Access the Find Applicants page in advanced search mode (on the Find Applicants page, click the Advanced Keyword Search link).

Find Applicants

Saved Resume and Applicant Search: Select Search... Find Applicants

Advanced Keyword Search

Find Applicants
Save Search
Reset Search

[Basic Search](#)
[Profile Match](#)
[Search Tips](#)

Search My Applicants

Match Applicants Using: All Fields

Resume Text or Keywords:

Resume Language: English

Job Opening ID: 503712 Manager-Operations

Emp ID:

Profile ID:





Display applicants in Applied status to the Job Opening

Expressed interest in the same job family as the job opening is in

Keywords that match the job description

| Applicant Type | Exclude Applicant Status from Search | | | | | | | | | | |
|---|---|--------|-------------|--------------------------|------------|--------------------------|-----------|--------------------------|--------------|--------------------------|------------|
| <input type="checkbox"/> External Applicant <input type="checkbox"/> Internal Applicant <input type="checkbox"/> Non-Employee | <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #e6f2ff;"> <th style="width: 15%; padding: 5px;">Select</th> <th style="padding: 5px;">Description</th> </tr> </thead> <tbody> <tr> <td style="text-align: center; padding: 5px;"><input type="checkbox"/></td> <td style="padding: 5px;">010 Active</td> </tr> <tr> <td style="text-align: center; padding: 5px;"><input type="checkbox"/></td> <td style="padding: 5px;">020 Hired</td> </tr> <tr> <td style="text-align: center; padding: 5px;"><input type="checkbox"/></td> <td style="padding: 5px;">030 Inactive</td> </tr> <tr> <td style="text-align: center; padding: 5px;"><input type="checkbox"/></td> <td style="padding: 5px;">040 Queued</td> </tr> </tbody> </table> | Select | Description | <input type="checkbox"/> | 010 Active | <input type="checkbox"/> | 020 Hired | <input type="checkbox"/> | 030 Inactive | <input type="checkbox"/> | 040 Queued |
| Select | Description | | | | | | | | | | |
| <input type="checkbox"/> | 010 Active | | | | | | | | | | |
| <input type="checkbox"/> | 020 Hired | | | | | | | | | | |
| <input type="checkbox"/> | 030 Inactive | | | | | | | | | | |
| <input type="checkbox"/> | 040 Queued | | | | | | | | | | |

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

| | | |
|----------------------------|--|--------------------------------------|
| Application Date Range: | <input type="text"/>  to <input type="text"/>  | |
| Referral Source: | <input type="text"/> | <input type="button" value="Clear"/> |
| Referral SubSource: | <input type="text"/> | <input type="button" value="Clear"/> |
| Work Experience: | <input type="text"/> | <input type="button" value="Clear"/> |
| Competencies: | 0160 Ability to prioritize tasks, 0212 Organize people and go | <input type="button" value="Clear"/> |
| Degrees: | <input type="text"/> | <input type="button" value="Clear"/> |
| School Education: | <input type="text"/> | <input type="button" value="Clear"/> |
| Honors and Awards: | <input type="text"/> | <input type="button" value="Clear"/> |
| Licenses & Certifications: | <input type="text"/> | <input type="button" value="Clear"/> |
| Language Skills: | <input type="text"/> | <input type="button" value="Clear"/> |
| Memberships: | <input type="text"/> | <input type="button" value="Clear"/> |
| Responsibilities: | <input type="text"/> | <input type="button" value="Clear"/> |
| Tests/Examinations: | <input type="text"/> | <input type="button" value="Clear"/> |
| Job Family: | <input type="text"/>  | |
| Recruiting Location: | <input type="text"/>  | |
| Country: | <input type="text"/> | <input type="button" value="Clear"/> |
| State: | <input type="text"/> | <input type="button" value="Clear"/> |
| City: | <input type="text"/> | |

[Basic Search](#)
[Profile Match](#)
[Search Tips](#)

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

Note. The advanced search includes many of the same search criteria options as the database search and simple keyword search. This section describes only those page elements that are used exclusively for advanced searches.

Reset Search

For advanced keyword searches, resetting the search deselects the Search My Applicants check box.

Page Elements for Saved Searches

Delete Search This button appears if you access the page by clicking the search name on the Saved Searches page. Click this button to delete the saved search.

Advanced Keyword Search

Match Applicants Using Choose which search criteria an applicant must match:

- Select *All Fields* to have Verity use Boolean AND logic that finds applicants that meet all of the specified search criteria.
- Select *Any Field* to have Verity use Boolean OR logic that finds applicants that meet at least one of the specified search criteria.

Note. These two types of searches produce different results even if all other search criteria is identical, and applicants who meet the criteria in both types of searches can receive different scores for the different types of searches. Also, scores assigned by the Advanced Search differ from those assigned by the Profile Match Search, which searches a different Verity collection and uses different Verity queries.

Resume-Related Search Criteria

Resume Text or Keywords Enter any words or phrases that you want the system to look for in applicant's resumes. The system searches both resume text that has been entered in the database and external resume attachments. It does not search any other application data.

Resume Language The Verity search collections that contain resume text are associated with specific languages. Specify the language for the collection that you want to search.

Profile Selection Fields

Use these fields to select a profile that the system uses to prepopulate the profile-related search criteria fields further down the page. You can only use one profile.

| | |
|-----------------------------|--|
| Job Opening ID | <p>Select a job opening ID, and the system enters items from the job opening's profile into the profile-specific search criteria fields on this page. This occurs regardless of whether profile utilization is activated on the Recruiting Installation - General page.</p> <p>If there is no profile content for the selected job opening, three additional check boxes appear on this page. Use these check boxes to indicate how to use the job opening in the search.</p> <hr/> <p>Note. If you enter a job opening, use the Save for Compliance button to save your search results for auditing and statutory reporting purposes. The saved search and results can be tracked using the Manage Job Opening page: Activity & Attachments tab.</p> <hr/> |
| Emp ID (employee ID) | <p>This field appears only if person profile integration is activated on the Recruiting Installation - General page.</p> <p>Select an employee ID, and the system enters items from the employee's primary profile into the profile-specific search criteria fields on this page.</p> <p>Recruiting administrators can select any employee. Other users can select only their own employee ID and the employee IDs of their direct reports, if any.</p> |
| Profile ID | <p>This field appears only if profile utilization is activated on the Recruiting Installation - General page.</p> <p>If you entered a job opening ID, this field displays the primary profile for the selected job opening and is read-only.</p> <p>If you entered an employee ID, the field displays the primary person profile for the employee and is read-only.</p> <p>If you have not entered either a job opening or employee ID, you can use this field to select any non-person profile to use to populate the profile-specific search criteria fields on this page.</p> |

Additional Job Opening Search Settings

These check boxes appear if you enter a job opening ID that is not associated with any profile content. Use the check boxes to indicate how to use the selected job opening ID in the search.

| | |
|---|--|
| Display applicants in Applied status to the Job Opening | Select this check box to search for applicants who have applied for the specified job opening. If you use the delivered statuses, these are applicants whose disposition for the job opening is <i>Applied</i> . |
| Expressed interest in the same job family as the job opening is in | Select this check box to search for employees whose job applications list the job family to which the selected job belongs. |
| Keywords that match the job description | Select this check box to search applicant resumes for words that are in the primary job posting title. |

Applicant Filtering

Applicant Type Select the check box next to the type of applicant to include in the search. You can select more than one. Options are:

- *Internal Applicant*
- *External Applicant*
- *Non-Employee*

Note. If you do not select any of these check boxes, all types of applicants are included in the search.

Exclude Applicants Select which applicant statuses are to be excluded from your search results. You can exclude more than one applicant status. Options are:

- *010 - Active*
- *020 - Hired*
- *030 - Inactive*
- *040 – Queued*

Note. Because this search uses the Verity search collection, the search results include only applicants with the statuses that were selected at the time the collection was built, regardless of what status-based criteria you select in this field. For example, if the collection includes only active applicants, but you attempt to search for inactive applicants by excluding all statuses other than *Inactive*, then the search results will be empty.

Application Date Range to Enter a date range within which the job application must have been entered into the system.

Referral-Related Search Criteria

Referral Source Select a referral source. The system limits the search results to applications that are associated with the specified source.

Referral SubSource Select a referral subsource. The options in this field depend on the referral source that you selected.

Qualification-Related Search Criteria

If you select a profile using the Job Opening ID, Emp ID, or Profile ID field, the system copies profile content items (specific qualifications, such as a specific competency or a specific degree) into these fields so that you can search for applicants with matching qualifications.

See [Chapter 12, "Searching for Applicants," Understanding Profile-Based Searching in the Advanced Keyword Search](#), page 348.

Work Experience

Enter the desired number of years of work experience.

If you entered a job opening ID, the system displays values from the Work Experience and Education fields in the job opening. Although these default values come from a matrix where years of experience are matched to the applicant's level of education, the search just looks for the number of years of experience without matching it to any particular education level.

<Profile Content Types> All fields between the Work Experience field and the Job Family field correspond to a profile content type that has been configured for use with Talent Acquisition Manager. For example, if Talent Acquisition Manager uses profiles to store competency, degree, and test/examinations data for job openings and applicants, then fields for those three profile content types appear on this search page.

See [Chapter 3, "Setting Up Profile Integration,"](#) page 25.

If you selected a profile to use to prepopulate these fields (using the Job Opening ID field, the Emp ID field, or the Profile ID field), the system copies data from the source profile into the corresponding search criteria fields. You can edit this default text, or you can click the adjacent Clear button to remove this default data.

Additional Search Settings

Job Family

Select a job family; the system searches for applications that list this job family.

Recruiting Location

Select a recruiting location; the system searches for applications that specify this location as either a first or second choice location.

Country, State, and City

Enter geographical search criteria; the system searches for applicants with primary addresses in the country, state, and city that you specify.

Search Results

The search results grid for an advanced keyword search is the same as the grid that shows the results of a simple keyword search.

Performing Profile Searches

Access the Recruitment Profile Match page (click the Profile Match link on the Find Applicants page.)

Recruitment Profile Match

▼ View Profile Match Search criteria

Recruiter Profile Search

Use the Match field to select the type of profile you want to match, and enter the specific Job Opening ID, Employee ID, Profile ID or Applicant ID that you want to match. Use the With field to choose the type of profile to include in your search results.

Use Saved Profile Match:

Match:

Job Opening ID: Manager-Operations

With:

[Basic Search](#) [Advanced Search](#)

Recruitment Profile Match page: search criteria

✓ 21 Results Found

| Select | Score | Profile ID | Employee ID | Name | Take Action |
|--------------------------|-------|------------|-------------|--------------------|------------------|
| <input type="checkbox"/> | 35% | 100754 | K0G001 | Rebekah Jones | Select Action... |
| <input type="checkbox"/> | 35% | 100755 | K0G003 | Darlene Bergsten | Select Action... |
| <input type="checkbox"/> | 35% | 100756 | K0G005 | Ginger Buckalew | Select Action... |
| <input type="checkbox"/> | 35% | 100757 | K0G007 | Marilyn Drake | Select Action... |
| <input type="checkbox"/> | 35% | 100758 | K0G008 | Clare Justin | Select Action... |
| <input type="checkbox"/> | 13% | 100399 | HXSSMGR01 | Joan Falcone | Select Action... |
| <input type="checkbox"/> | 13% | 210009 | HXSPCEE26 | Roy Kent | Select Action... |
| <input type="checkbox"/> | 13% | 210020 | HXCPEE07 | Gina Gonzalez | Select Action... |
| <input type="checkbox"/> | 13% | 210214 | HXCPMJOBS2 | Greg Bloomfield | Select Action... |
| <input type="checkbox"/> | 12% | 100409 | KG0009 | Robin de la Camara | Select Action... |
| <input type="checkbox"/> | 12% | 100462 | LE0017 | Felicia Rodriguez | Select Action... |
| <input type="checkbox"/> | 12% | 100856 | KU0119 | Susan Hoinck | Select Action... |
| <input type="checkbox"/> | 12% | 200030 | HXJPM024 | Lina Nayberg | Select Action... |
| <input type="checkbox"/> | 12% | 200031 | HXJPM025 | Poonam Basky | Select Action... |
| <input type="checkbox"/> | 12% | 210019 | HXCPEE02 | Penee Comet | Select Action... |

[Select All](#) [Deselect All](#) **Group Action:**

Recruitment Profile Match page: search results for employees

Recruiter Profile Search

Use Saved Profile Match This field appears if you have access to any saved profile searches. Select a saved search and click the Save button to perform the search. This list of available saved searches includes public searches as well as private searches that you created.

Match Select the type of profile that you want to match: *Applicant Profile, Employee Profile, Job Opening Profile, or Non Person Profile.*

For example, if you are searching for employees that match a particular job opening, then select *Job Opening Profile.*

| | |
|----------------------|---|
| [Profile ID] | <p>Enter the unique ID for the profile that you want to match.</p> <p>The label for this field is Applicant ID, Employee ID, Job Opening ID, or Profile ID, depending on the type of profile you want to match.</p> <p>For security reasons, you cannot prompt for applicant IDs; instead, you must manually enter the ID.</p> <p>When selecting an employee ID, recruiting administrators can select any employee. Other users can select only their own employee ID and the employee IDs of their direct reports, if any.</p> |
| With | <p>Select the type of profile that you are searching for: <i>Applicant Profile, Employee Profile, Job Opening Profile, or Non Person Profile</i>.</p> <p>For example, if you are searching for employees that match a particular job opening, then select <i>Employee Profile</i></p> <p>If you are matching a non-person profile, the only available options are <i>Job Opening Profile</i> and <i>Non Person Profile</i>.</p> <hr/> <p>Important! When you search for job openings, only job openings with open postings are included in the search results. When you search for employees, only employees who do not already have applicant records are included in the search results.</p> <hr/> |
| Search | Click to perform the search and view results. |
| Save Search | After you have completed all three search criteria fields, click this button to access the Save Search page and save your search criteria. |
| Reset Search | Click this button to clear all three search criteria fields. |
| Delete Search | This button appears if you access the page by clicking the search name on the Saved Searches page. Click this button to delete the saved search. |

Search Results

The columns that appear in the search result grid vary depending on the type of profile. Many columns, such as the applicant ID, type, and name or the employee ID and name, simply provide identifying information. This section does not discuss those fields.

| | |
|---------------|--|
| Select | Select this check box to include the row when you perform a group action or when you click the Compare button to review a detailed profile comparison. |
| Score | Displays a score that represents how closely the application matches your search criteria. The Verity search engine assigns this score. |

Note. Scores for a particular pair of profiles can vary depending on the search direction. A simplified example of this is if a job opening lists five competencies and the applicant has four of them. The job opening has 100% of the applicant's competencies, but the applicant has only 80% of the job opening's competencies.

Resume and Application These columns appear only if you searched for applicants. Click the icons in these columns to open new windows where you can review the applicant resume and application.

If no resume exists for a particular applicant (for example, the applicant instead completed the work experience fields in the online application), then this column is blank.

If none of the applicants in the grid have resumes, the entire Resume column is hidden.

Former Employee This field appears only if you searched for applicants. An icon appears if the application indicates that the applicant is a former employee; the column is blank otherwise. The system does not verify this information.

If none of the applicants are former employees, the entire column is hidden.

Take Action Select an action you want to take for the selected applicant or employee.

These actions are available for applicants: *Add Applicant to New List*, *Add Applicant to Saved List*, *Change Applicant Status*, *Forward Applicant*, *Link Applicant to Job*, *Print Application Details*, and *Send Correspondence*.

See [Chapter 19, "Managing Applicants," Actions in the Take Action Field, page 559](#).

There is only action available for employees: *Invite Application*. This action is available when you search for employee profiles that match a job opening profile or when you search for job opening profiles that match an employee profile.

When you select this option, the system sends the employee an email invitation to apply for the job opening. The text of the email comes from the *HRS_INVITE_APPLICATION* generic template. Only employees for whom you have email addresses can be invited to apply.

See *PeopleTools PeopleBook: Workflow Technology*

Additional Page Elements for Performing Actions

Group Action and Go Select an action to be performed on all selected applicants. Unlike actions performed on a single applicant using the Take Action field, the system does not perform the action immediately. Instead, you must click the Go button to initiate the selected action.

In this context, the available group actions are the same as the available individual actions.

Compare Click to access the Compare Results page, where you can see detailed information about each content item in the source profile and you can see how well each selected profile matches each content item.

Reviewing Profile Match Details

Access the Compare Results page (click the Compare button on the Recruitment Profile Match page)

2. On the AIRS Oxygen website, enter your search criteria and start the search.
3. Check the applicants returned by AIRS and identify potential candidates.

You can save details of applicants that you plan to contact using the AIRS Oxygen options Save to Folder and Save to Disk.

4. Contact the applicants identified by the search to find out if they are interested in applying to your organization.
5. Load the applicants' details into your PeopleSoft database as follows:
 - a. Navigate to the AIRS Oxygen website and display the applicant information.
 - b. Click the Save to Talent Acquisition Manager link.

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

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

Working With Saved Searches

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

- Save search criteria and automatch searches.
- Save search results.
- View saved searches.
- Run automatch saved searches

Understanding Saved Searches

This overview describes options for saving searches and search results.

Saved Search Criteria

To save search criteria, use the Save Search button that appears in the same group box as the search criteria. This option is available for resume and keyword searches and advanced keyword searches (which use the same set of saved searches) and for profile match searches.

The system saves the criteria under a name that you assign. You can select and run a saved search from the page where you would normally run the search or from the Saved Searches page.

Saved searches can be designated as either public or private. Although anyone can run a public search, only administrators and the creator of the search can update or delete the search criteria.

Automatch Saved Searches

When you save search criteria for a resume and keyword search or an advanced keyword search, you can mark the saved search as an automatch search so that you can run the search in batch at regularly scheduled times. The Run Automatch Search (HRS_AM) process performs the searches and sends the search results to the search owner, who can then view the results of the Automatch search and take appropriate action.

The system keeps track of which applicants have already been sent to you, so each time the automatch search runs, it sends you only the applicants that have not been previously sent to you.

Note. This option is not available for profile match searches.

Compliance Searches

For auditing and statutory reporting purposes, you can save the results of specific searches. To save search results, use the Save for Compliance button. This button appears below the search results grid for Advanced Keyword Searches and Profile Match searches.

Note. On the Recruiting Installation - General page, you can make it mandatory to save search results for any search that includes a specific job opening in the search criteria.

The saved search appears on the Saved Searches page with the results type *Compliance*. If you identified a job opening for the search, the Job Opening page: Activity and Attachments tab includes the search in the Related Searches grid. From either location, you can access the saved search results.

Note. Although the original search results grid includes separate rows for each application that meets the search criteria, the saved results show only one row per applicant per application date. That is, if an applicant submits multiple applications on the same date, the original search results show a row for each application, but the saved results show one row for the date.

Pages Used to Work With Saved Searches

| Page Name | Definition Name | Navigation | Usage |
|------------------------------------|-----------------|---|--|
| Save Search (save search criteria) | HRS_REC_SAV_SCH | Recruiting, Find Applicants Enter criteria for any type of search other than a database search, then click the Save Search button that appears with the search criteria on the Find Applicants page. | Save applicant search criteria. |
| Save Search (save search results) | HRS_REC_SAV_RSL | Recruiting, Find Applicants Perform any type of search other than a database search, then click the Save for Compliance button that appears with the search results. | Save search results for auditing and statutory reporting purposes. |

| Page Name | Definition Name | Navigation | Usage |
|--|------------------------|--|---|
| Saved Searches | HRS_REC_SEARCHES | Recruiting, Saved Searches, Saved Searches | Review saved searches, and either run them or review the results, depending whether the criteria or results were saved. |
| Compliant Results Automatch Results | HRS_REC_SCHRSULTS | Click the View Results button for a compliance or automatch search on the Saved Search page. | View saved search results. |
| Run Automatch Search Agent | HRS_RUN_AMH | Recruiting, Administration, Run Automatch Search, Run Automatch Search Agent | Run the Run Automatch Search (HRS_AM) process to search for applicants that meet the criteria in automatch searches. |

Saving Search Criteria and Automatch Searches

Access the Save Search page (on the Find Applicants page, click the Save Search button).

Save Search

Save Search

*Search Name:

Job Opening ID:

Status:

Access:

Setup as Auto match

Automatch Options

End Search Agent on:

End Date:

[Return to previous page](#)

Save Search page (for saving search criteria)

Search Name Enter a name for the saved search. This name identifies this saved search on the Saved Searches page.

Job Opening ID If the search criteria that you are saving included a job opening; the field displays the job opening ID.

Access Select the access type for this search. Options are:

- *Private*: Only the creator of the search can access, modify, or delete this search.
- *Public*: Anyone can access this search, but only the creator or an administrator can modify it or delete it.

Setup as Auto match Select this check box to create an automatch search that will be processed by the Run Automatch Search process.

Automatch Options

This group box is visible if the Setup as Automatch check box is selected. Use the fields in this group box to control how long the automatch search remains active.

End Search Agent On and End Date If the automatch search includes a job opening, select from these options: *End on Max Posting Close Date*, *End on Job Opening Close Date*, or *End on Specified Date*.

If the automatch search does not include a job opening, the system selects *End on Specified Date* and the field becomes read-only.

If the End Search Agent On field is *End on Specified Date*, then enter the date on which the automatch search expires.

Saving Search Results

Access the Save Search page (on the Find Applicants page, click the Save for Compliance button).

The screenshot shows a web form titled "Save Search". At the top, there is a blue header bar with the text "Save Search". Below this, the form contains three main fields:

- *Results Set Name:** A text input field that is currently empty.
- Job Opening ID:** A text input field containing the value "503712".
- Access:** A dropdown menu with "Public" selected.

 At the bottom left of the form is a "Save" button. To its right is a blue hyperlink labeled "Return to Previous Page".

Save Search page (for saving search results)

| | |
|---------------------------|---|
| Results Set Name | Enter a name for the saved search results. This name identifies this saved search on the Saved Searches page. |
| <Profile ID> | <p>If the search criteria identified a job opening, employee ID, or non-person profile, this read-only field displays the selected value. The field label changed depending on the type of profile shown.</p> <p>If the search criteria did not identify a job opening, employee ID, or non-person profile, this field is hidden.</p> <p>If you save a search that is associated with a job opening, the system adds the search to the Related Searches grid on the Job Opening page: Activity & Attachments tab.</p> |
| Access | <p>Select the access type for this search. Options are:</p> <ul style="list-style-type: none">• <i>Private</i>: Only the creator of the search can access this search.• <i>Public</i>: Anyone can access this search. |

Viewing Saved Searches

Access the Saved Searches page (Recruiting, Saved Searches, Saved Searches).

Saved Searches

| Target Profile Type | | | | | | | | |
|---|--------------|-------------|--------------|-------------|--------|--------|---|--------|
| Saved Searches & Automatches | | | | | | | | |
| Customize Find View All 1 First 1-10 of 10 Last | | | | | | | | |
| Search Name | Results Type | Search Type | Last Updated | Job Opening | Type | Active | Run Search | Delete |
| ADMIN OPPORTUNITY | Criteria | Advanced | 2009-08-09 | None | Public | Yes | <input type="button" value="Search"/> | |
| COMPUTERS | Automatch | Advanced | 2009-08-22 | None | Public | Yes | <input type="button" value="View Results"/> | |
| EXAMP.2-EMPS NOT APP | Criteria | Profile | 2009-08-09 | None | Public | Yes | <input type="button" value="Search"/> | |
| EXAMPLE SEARCH/MATCH | Criteria | Profile | 2009-08-09 | None | Public | Yes | <input type="button" value="Search"/> | |
| HRIS IN OAKLAND | Criteria | Advanced | 2004-09-29 | None | Public | Yes | <input type="button" value="Search"/> | |
| JO503712 - MANAGER | Compliance | Advanced | 2009-08-22 | None | Public | Yes | <input type="button" value="View Results"/> | |
| SEARCH J.O. 500002 | Criteria | Advanced | 2009-08-09 | None | Public | Yes | <input type="button" value="Search"/> | |
| TECH SF | Criteria | Advanced | 2004-09-29 | None | Public | Yes | <input type="button" value="Search"/> | |
| CALIFORNIA SEARCH | Criteria | Advanced | 2004-10-05 | None | Public | Yes | <input type="button" value="Search"/> | |
| COLORADO SEARCH | Criteria | Advanced | 2004-10-05 | None | Public | Yes | <input type="button" value="Search"/> | |

Saved Searches page

Saved Searches and Automatches

This grid lists public saved searches as well as private saved searches that you created. You cannot see other users' private saved searches.

Search Name

Displays the name of the saved search. If you are the owner or administrator of a saved criteria search or automatch search, the name is a link that you click to access the Find Applicant page in a mode where you can edit the search criteria and save your changes.

Note. When you access the Find Applicants page from the Saved Searches page, the fields for defining the saved search appear on the Find Applicants page. Use these fields, and the additional Save Changes and Delete Search buttons, to modify or delete your saved search.

Results Type

Displays *Criteria*, *Automatch*, or *Compliance* to indicate the type of saved search.

| | |
|--------------------|--|
| Search Type | Displays <i>Advanced</i> or <i>Profile</i> to indicate which mode the Find Applicants page was in when you entered the search criteria or performed the search. |
| Job Opening | For compliance searches that are associated with a specific job opening, this field identifies the job opening and provides a link to the Job Opening page. For other searches, this field displays <i>None</i> . |
| Type | Displays <i>Public</i> or <i>Private</i> to indicate who has access to the search. The only private searches that appear in the grid are the ones that the current user created. |
| Run Search | For criteria searches, a Search button appears. Click this button to run the search and view results on the Find Applicants page. For automatch searches, a View Results button appears. Click this button to view the results from the last time the search was processed. For compliance searches, a View Results button appears. Click this button to view the saved results. |

Additional Page Element

| | |
|------------------------|---|
| Find Applicants | Click this button to access the Find Applicants - Advanced Keyword Search page. |
|------------------------|---|

Running Automatch Saved Searches

Access the Run Automatch Search Agent page (Recruiting, Administration, Run Automatch Search, Run Automatch Search Agent).

The Run Automatch Search (HRS_AM) process searches the applicant database for applicants that match the criteria in all saved automatch searches.

When the system finds an applicant that matches the criteria, a workflow sends emails to the recruiters responsible for the requisitions. Recruiters can view the results of the Automatch search and then link the applicants to the job opening.

See [Chapter 12, "Searching for Applicants," Understanding Saved Searches, page 369](#).

Chapter 13

Screening and Routing Applicants

This chapter provides an overview of the screening, process, lists prerequisites, and discusses how to:

- Evaluate answers to open-ended screening questions.
- (USF) Run the priority placement process
- Review and rate applicants
- Run screening levels and apply results.
- (USF) Rank applicants and generate the certificate of eligibles
- Route applicants.

Understanding the Screening Process

Screening is the process used by recruiters to evaluate a list of potential candidates and narrow the list to a few qualified applicants.

Process Overview

The basic screening process involves these steps:

1. Review and rate applicants.
 - a. Review the list of applicants.
 - b. Review applicant competency and accomplishment ratings, and add ratings where they don't yet exist.

An applicant who is not rated does not meet the screening criteria.

Note. If you use open-ended questions during the screening process, you must also ensure that applicants' answers have been evaluated. Although the evaluation process takes place outside of the screening pages and therefore is not included in this list, it is a necessary prerequisite for optimum screening results, similar to adding ratings for competencies.

2. Run and apply screening levels:

- a. Review the screening levels for the job

You can review both the overall list of screening levels and the detailed screening criteria and processing rules for individual screening levels. You can optionally update the screening level details.

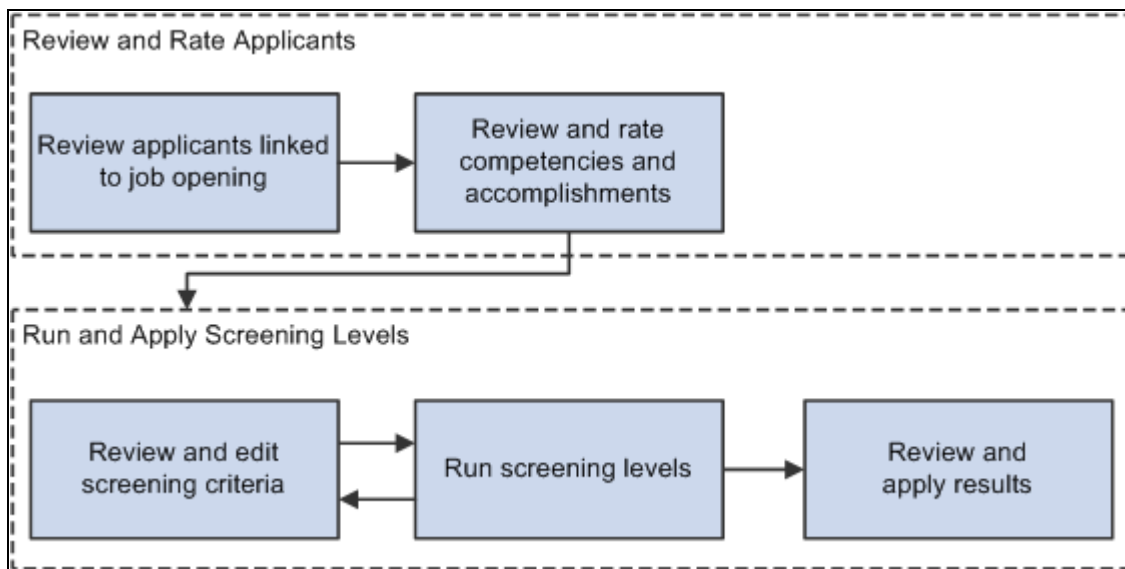
- b. Run the screening levels.

This process applies the screening level settings to specific applicants to produce a pass/fail result and an overall score. You can change screening criteria and rerun the screening levels as many times as you like before continuing to the next step.

- c. Review and apply the results.

Review the pass/fail results, the overall score, and detailed information about how the score was figured. When you are satisfied with the results, applying them updates applicant dispositions according to the screening level rules.

The following diagram illustrates these steps:



Basic process flow for applicant screening

At the conclusion of this process, you are ready to continue to the routing process, where you can seek an opinion from any person in the system regarding suggested future actions.

(USF) Extended Process for Federal Users

The screening process for U.S. federal government jobs involves some additional steps:

- 1. At the beginning of the process, you run the RS - Priority Placement (HRS_PRI_PLCM) Application Engine process to automatically add priority placement applicants to the job opening.

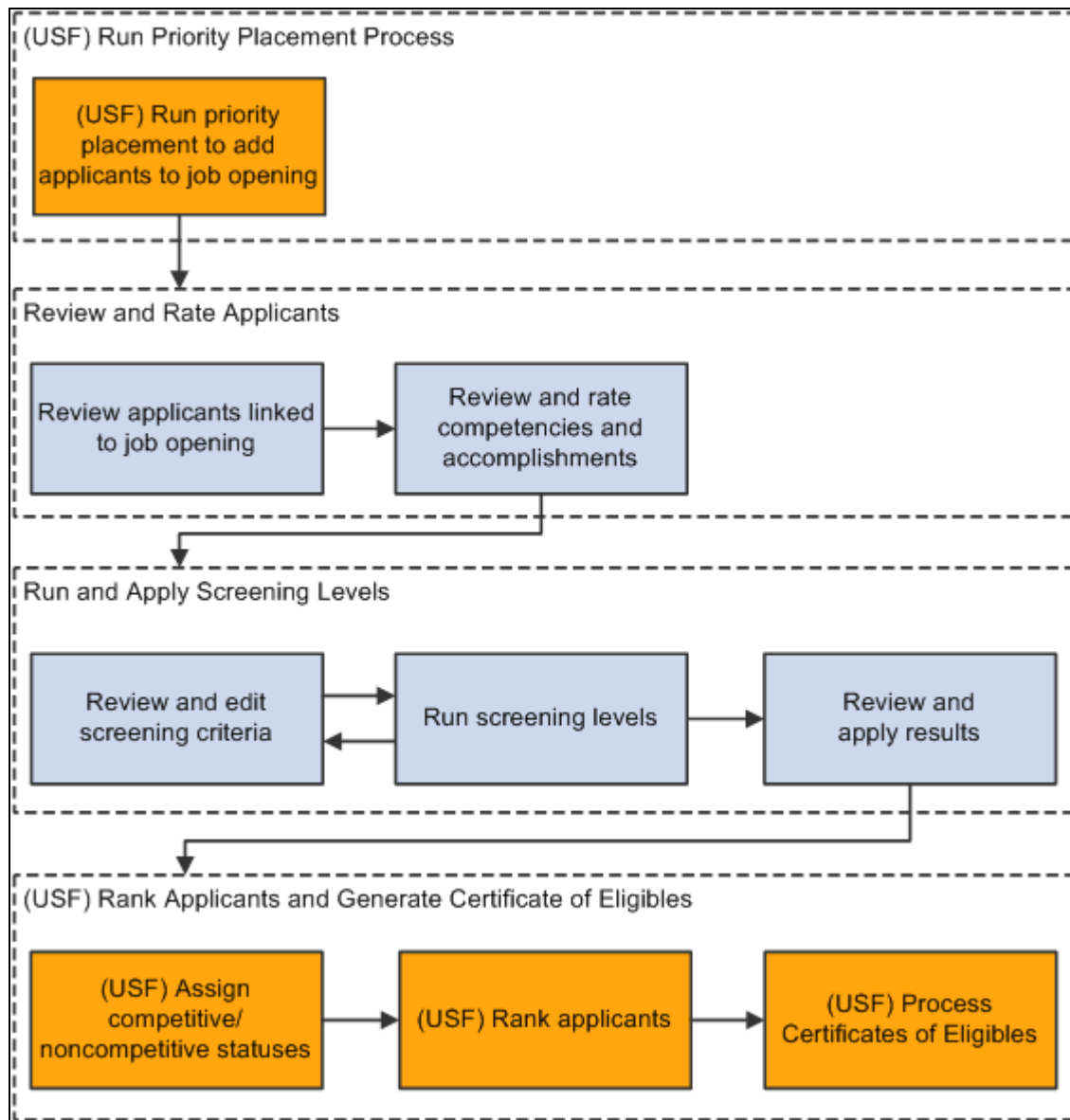
The RS - Priority Placement process adds applicants with a priority placement code *and* salary grade and level that match the job opening. The priority placement code by itself is not sufficient.

2. After you finish running screening levels and applying results, you rank applicants and generate the Certificate of Eligibles.

To accomplish this, you need to:

- a. Assign competitive/non-competitive statuses to applicants.
 Applicants without a competitive/non-competitive status are excluded from the ranking process.
- b. Rank applicants according to their cumulative screening scores, augmented by preference items.
- c. Generate a Certificate of Eligibles listing the ranked applicants.

The following diagram shows the additional steps in the U.S. federal screening process:



Additional steps for U.S. federal screening processes

Prerequisites

There are two types of prerequisites for screening processing.

First, there are implementation tasks, during which you create reusable definitions that are referenced in individual job openings and applications.

Screening-related implementation tasks include:

1. (USF) Defining veteran preference codes.
2. (USF) Defining priority placement codes.
3. Creating screening level definitions.
4. Creating screening templates and linking them to recruitment templates.

Then, at runtime, you need to add job-specific screening criteria to each screening level that will be used.

This process involves selecting specific qualifications, questions, and job attributes to look at when assessing applicants. When you define screening criteria for a job opening, you can also review and override default settings from screening level definitions.

See Also

[Chapter 5, "Setting Up Screening Processes," page 57](#)

[Chapter 7, "Setting Up Recruiting Templates," page 113](#)

[Chapter 10, "Creating Job Openings," Defining Screening Level Rules and Criteria, page 270](#)

Evaluating Answers to Open-Ended Screening Questions

This section provides an overview of open-ended question evaluations and discusses how to:

- Review questions to evaluate.
- Assign scores to answers.

Understanding Open-Ended Question Evaluations

When you associate an open-ended question with a job opening, you also assign evaluators for the question.

When the system receives an application with answers to open-ended questions, it sends notifications to the assigned evaluators, advising them of the need to assess the answers. Only the assigned evaluators can award an applicant points for the answer.

Unevaluated answers do not receive any points during screening. When reviewing screening results, you can review an applicant's questionnaire to ascertain whether there are unevaluated open-ended questions that affected screening results.

Note. If your organization uses PeopleSoft Enterprise HRMS Portal Pack, recruiters can also use the Recruiter Alerts pagelet and the Unevaluated Answers page to send reminder notifications to evaluators.

See Also

PeopleSoft Enterprise HRMS Portal Pack 9.1 PeopleBook, "Using HRMS Portal Pack Pagelets," Viewing Recruiter Alerts for Talent Acquisition Manager

Pages Used to Evaluate Open-Ended Questions

| Page Name | Definition Name | Navigation | Usage |
|--|------------------|--|---|
| Evaluate Open Ended Questions | HRS_EVAL_ANS_LST | Self-Service, Recruiting Activities, Evaluate Open Ended Questions, Evaluate Open Ended Questions | Review a list of open-ended questions whose answers you have been assigned to evaluate. |
| Evaluate OE Answers (evaluated open ended answers) | HRS_EVAL_ANS_SEC | Click the Reference Number link in the Answers to be Evaluated grid on the Evaluate Open Ended Questions page. | Assign scores to answers for open-ended questions. |

Reviewing Questions to Evaluate

Access the Evaluate Open Ended Questions page (Self-Service, Recruiting Activities, Evaluate Open Ended Questions, Evaluate Open Ended Questions).

Evaluate Open Ended Questions

Listed Below are answers to open ended questions for applicants for a particular Job Opening. Select the Reference Number on the desired grid row to see the details and provide a score for each applicant that has answered. When an evaluation for an answer is complete, choose the Submit button to release questions for screening. To store assigned score, but not submit questions at this time, choose the Save button.

| Answers to be Evaluated | | | | |
|-----------------------------------|-------------------|--------------|--------------------------|-----------|
| Reference Number | Created | Points Given | Evaluated | Recruiter |
| 30013015003951034 | 05/31/2009 2:09PM | 3 | <input type="checkbox"/> | |
| 30013215003951034 | 05/31/2009 2:25PM | | <input type="checkbox"/> | |

Evaluate Open Ended Questions page

The Answers to Be Evaluated grid includes a row for each answer that the user has been assigned to evaluate. Once the evaluator has submitted an evaluation, the row disappears from the grid.

| | |
|-------------------------|--|
| Reference Number | The system identifies answers to be evaluated using a reference number rather than providing identifying information for the applicant or job opening. This helps ensure non-biased evaluations. Click the reference number to access the Evaluate OE Answers page, where the evaluator assigns points to the answer. |
| Points Given | If an evaluator has saved points but not yet submitted them, the point value appears in this column. The column is empty for questions where the evaluator has not saved a point value. |
| Evaluated | Displays a deselected check box to indicate that the evaluation is not complete. |
| Recruiter | Displays the primary recruiter, if any, for the job opening with which the question is associated. |

Assigning Scores to Answers

Access the Evaluate OE Answers page (click the Reference Number link in the Answers to be Evaluated grid on the Evaluate Open Ended Questions page).

Evaluate OE Answers

Reference Number: 30012915003951034

Question:
Please discuss in a short essay the protocols you would establish in a newly formed Burns Unit in a rural hospital.

Applicant Answer:

1. Perform primary assessment and re-assess as needed according to patient's acuity level.
2. Treat any life-threatening occurrence immediately, i.e., CPR.
3. Perform secondary assessment and reassess, as needed according to patient's acuity level.
4. Assist MD in burn assessment (Total Body Surface Area (TBSA) and depth of burn) using burn assessment chart (Rule of Nines).
5. Assess possibility of chemical exposure.
6. Remove clothing/jewelry (especially rings).

Maximum Points: 5 **Total Words:** 67 **Enter Evaluation Points:**

Evaluate OE Answers page

| | |
|--------------------------------------|---|
| Question and Applicant Answer | Displays the full text of the question along with the applicant's answer to provide context for the evaluator's assessment. |
| Maximum Points | Displays the maximum points that the evaluator can award the applicant for this answer. |
| Enter Evaluation Points | Enter the number of points to be awarded to the applicant for this answer. Refer to the Maximum Points for the question to determine the rating scale for points. |
| Save, Submit, and Cancel | <p>Click Save to save the evaluation points without submitting the evaluation. Return to the page later to submit a final evaluation.</p> <p>Click Submit to submit evaluation points. Once you submit an evaluation, the answer no longer appears in the Answers to Be Evaluated grid on the Evaluate Open Ended Questions page.</p> <p>Click Cancel to return to the Evaluate Open Ended Questions page without saving changes.</p> |

(USF) Running the Priority Placement Process

This section provides an overview of the priority placement process and discusses how to:

- Run the priority placement process for one or many jobs openings.
- Run the priority placement process from the context of a specific job opening.

Understanding the Priority Placement Process

Applicants with priority placement are entitled to automatic consideration for job openings that meet certain criteria, even if the applicant hasn't specifically applied for the job opening. Use the RS - Priority Placement (HRS_PRI_PLCM) Application Engine process to identify those applicants and link them to job openings that have the same priority placement code.

The Priority Placement process identifies priority placement applicants that have the same Pay Plan and Occupational Series as the job opening that is being processed. It also ensures that the applicant's Salary Grade is equal to or greater than the grade specified on the job opening. The process then compares those applicants with active job openings that have that priority place code.

When an applicant has two priority placement codes for a particular job, and only one priority placement code method can be considered for that job series, the process determines which code to use by looking at the recruiting type (*Internal, Merit Promotion, or Open Competition*) that was defined on the job opening.

The Priority Placement process links applicants to job openings with an initial disposition of *Applied*. Once linked to the job opening, the applicant is goes through the same screening process as other applicants.

Note. Run the Priority Placement process after the closing date of the job posting and before running other screening processes.

Pages Used to Run the Priority Placement Process

| Page Name | Definition Name | Navigation | Usage |
|----------------------------|-----------------|---|---|
| Process Priority Placement | HRS_RUN_PR_PL | Recruiting, Administration, Process Priority Placement, Process Priority Placement | Run the RS-Priority Placement process on one job opening or all open job openings. |
| Screen Applicants | HRS_JO_SCR_LIST | Recruiting, Find Job Openings, Find Job Openings Click the job opening link in the Search Results group box on the Find Job Openings page. Click the Screen Applicants link on the Job Opening page: Manage Applicants tab. | Run the priority placement process for the job opening from which you accessed this page. |

Running the Priority Placement Process for One or Many Job Openings

Access the Process Priority Placement page (Recruiting, Administration, Process Priority Placement, Process Priority Placement).

Process Priority Placement page

All Open Job Openings Select this check box to run the RS - Priority Placement process on all job openings with an *Open* status. If you select this check box, the Job Opening ID field is unavailable.

Job Opening ID If you do not select the All Open Job Openings check box, enter the ID for a single job opening that you want to process.

Run Click to access the Process Scheduler Request page, where you schedule the process.

Running the Priority Placement Process from the Context of a Specific Job Opening

Access the Screen Applicants page (click the Screen Applicants link on the Job Opening page).

See [Chapter 13, "Screening and Routing Applicants," Reviewing Applicants Linked to Job Openings, page 387.](#)

To run the Priority Placement (HRS_PRI_PLCM) process:

1. In the Run field, select *Priority Placement*.
2. Click the Go button,
3. After the process finishes, click the Refresh icon.

To see the progress of the process, click the Process Monitor link to access the Process Monitor page.

If the process identified applicants who are entitled to priority placement for this job opening, their names now appear in the Applicants grid.

Reviewing and Rating Applicants

This section provides an overview of applicant ratings and discusses how to:

- Review applicants linked to job openings.
- Rate applicants.

Understanding Applicant Ratings

During the screening process, you can review the list of applicants linked to a job opening and, more specifically, see which applicants do not yet have ratings for competencies or other rated qualifications.

The system enables you to rate applicants at any time. For example, if your business process uses a preliminary screening level to filter out applicants who do not meet minimum requirements, then a second screening level that assesses rated qualifications, then it makes sense to rate applicants after running the first screening level so that you can avoid spending time rating applicants who do not meet your minimum qualifications.

Important! When a screening process includes qualifications that use ratings, unrated applicants do not receive any points for those qualifications.

The Rate Applicant page summarizes the applicant data for certain types of job qualifications—those that are implemented through the use of profile content types. The page displays a grid for each content type that is included in the job opening template, regardless of whether the job opening includes any related content items. For example, if the job opening template includes the Degrees content item, then the Rate Applicant page includes a Degrees grid regardless of whether you screen for degrees and regardless of whether the job opening even lists any degrees.

Within each grid, the page lists any specific qualifications that are being used as screening criteria. For example, the Competencies grid lists the specific competencies that are used in screening.

For each qualification, the page shows the related applicant data. This information is presented differently for rated and unrated content types:

- For rated content types such as competencies, you see the applicant's rating and its screening point value.

If the rating field is empty, the applicant is unrated, and you should add rating information to the application.

When you access the application from the Rate Applicants page, the Copy Limited Items from Job Openings button enables you to quickly add all of the unrated competencies to the application. You still need to open each competency to enter a rating.

- For unrated content types such as degrees, you see the points that the applicant will earn.

If the points field is empty, the applicant does not meet the criteria. This could be because the necessary information was not entered in the application, or it could be because the applicant truly does not have the qualification.

The Rate Applicant page provides direct access to the Application Details page, where you can add any necessary information to the application.

Pages Used to Review and Rate Applicants

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|-------------------|------------------------|--|---|
| Screen Applicants | HRS_JO_SCR_LIST | <p>Recruiting, Find Job Openings, Find Job Openings</p> <p>Click the job opening link in the Search Results group box on the Find Job Openings page.</p> <p>Click the Screen Applicants link on the Job Opening page: Manage Applicants tab.</p> | Review applicants linked to a job opening and perform various tasks related to screening. |
| Rate Applicant | HRS_RATE_APP | Click the Rate link on the Applicants group box on the Screen Applicants page. | Review applicant data that corresponds to the criteria for a specific screening level. |

Reviewing Applicants Linked to Job Openings

Access the Screen Applicants page (click the Screen Applicants link on the Job Opening page: Manage Applicants tab).

Job Opening

Screen Applicants


Posting Title: Web Developer

Job Opening Status: 010 Open

Position Number: 19143002 Web Developer


Business Unit: NSWBU Swiss Hotels

Job Family:


 [Print Job Opening](#)











Job Opening ID: 10041

Job Type: Standard

 Save
[Return to Job Opening](#)

[View All Applicants](#)
[View Screening Levels](#)
[View Screening Results](#)

Run:
[Process Monitor](#) 

| Applicants | | | | | | | | |
|--------------------------|--------------------------------------|--------|-------------|-------------|--------------------|---|---|----------------------|
| | Name | ID | Disposition | Status Date | Type | Resume | Application | Rate |
| <input type="checkbox"/> | Justin Curtis | 100016 | Applied | 10/11/2004 | External Applicant |  |  | Rate |
| <input type="checkbox"/> | Christopher Boardman | 100017 | Applied | 10/11/2004 | External Applicant |  |  | Rate |
| <input type="checkbox"/> | Genevieve Jackson | 100018 | Applied | 10/11/2004 | External Applicant |  |  | Rate |
| <input type="checkbox"/> | Stuart O'Neill | 100019 | Applied | 10/19/2004 | Employee |  |  | Rate |
| <input type="checkbox"/> | Adrienne Turner | 100021 | Applied | 10/11/2004 | Employee |  |  | Rate |

Run:

[Select All](#)
[Deselect All](#)
[Route Applicant](#)
[Merge Applicant](#)

Screen Applicants page

Print Job Opening

Click to access the Select Job Opening Sections page, where you configure and generate a printed version of the job opening data.

See [Chapter 17, "Managing Job Openings," Printing Job Openings, page 535.](#)

View All Applicants, View Screening Levels and View Screening Results

Use these links to access the indicates screening pages. The link for the current page is disabled.

Note. The View Screening Results link is visible only after a screening level has run successfully and the page has been refreshed.

Run and Go

The drop-down list box for the Run field lists the screening levels for the job opening. Select the screening level you want to run and click the Go button to begin running it. The system uses the RS-Job Opening Screening (HRS_JO_SCR) Application Engine process to screen applicants using the screening criteria for the selected screening level.

To monitor the progress of the screening process, click the Process Monitor link to open the Process Monitor page. It is convenient to be able to see when the process is complete because after the process finishes, you need to refresh the page to make the process results appear.

Note. (USF) In U.S. federal implementations, you can also use these fields to run the priority placement process for this job opening. The Run field includes a *Priority Placement* option that you can select and run. The Priority Placement process identifies applicants who are eligible for any of the job opening's priority placement programs and links them to the job opening. The federal screening process requires you to run the priority placement process before running any screening levels.



Click the Refresh icon after a screening level finishes running. Refreshing the page is necessary to make the screening level results appear.

(USF) Rank Applicants

This button appears only if screening results exist. Click the button to display the Rank Applicants page.

See [Chapter 13, "Screening and Routing Applicants," Ranking Applicants, page 411.](#)

Applicants

This grid lists all applicants linked to the job opening.

Name and ID

These fields display identifying information about the applicant. Click the name link to access the Manage Applicant page.

Disposition and Status Date

These fields display the applicant's disposition for the current job opening and the effective date of that status. After you apply the results of a screening level, the system updates the disposition to either the passing status or the failure status for the screening level.

Type

Displays *Employee, External Applicant* or *Non-Employee*. Non-employees are persons of interest who have records in your human resources system but are not employees.

Resume

Click to open a new window that displays the applicant's resume.

- If the resume is an attachment, the file opens in the new window.
- If the resume was entered as text, the new window displays the Applicant Resume page.
- If no resume exists for a particular applicant (for example, the applicant instead completed the work experience fields in the online application), then this column is blank.

If none of the applicants in the grid have resumes, the entire Resume column is hidden.

Application

Click to access the Application Details page, where you can review or the applicant's application for this job opening.

Before you run a screening level, you might need to update the application details with information such as competency ratings that the screening level is configured to evaluate.

Rate

Click to access the Rate Applicants page, where you can review applicant data for the criteria in each screening level. For example, if the screening level looks for a specific competency and a specific language skill, the Rate Applicant page displays the applicant's ratings for each area. If the applicant is unrated, you need to go to the Application Details page to add the ratings.

Page Elements for Performing Applicant Actions

In the Applicants grid, the first column is a check box that you select to choose applicants to be included when you use these page elements.

Route Applicant

Click this link to route the selected applicants.

See [Chapter 13, "Screening and Routing Applicants," Routing Applicants, page 417.](#)

Merge Applicant

Click this link to access the Review Duplicate Applicants page, where the selected applicants appear as a set of duplicates for you to review and optionally merge.

See [Chapter 19, "Managing Applicants," Identifying and Merging Duplicate Applicant Records, page 628.](#)

Note. When you run a screening level, the system does *not* limit screening to selected applicants.

Rating Applicants

Access the Rate Applicant page (click the Rate link on the Screen Applicants page).

Screen Applicants

Rate Applicant

Name: Otto Waalkes
Applicant ID: 3
Job Opening: 500432 Administrator-HR

[Save](#) [Cancel](#) [Previous Applicant](#) | [Next Applicant](#) | [Return to Previous Page](#)

Screening Levels View All First 3 of 4 Last

Description: Preliminary

Areas of Study
 There are no items for the Areas of Study section.

▼ **Competencies**

Content Items Details Customize | View All First 1-2 of 2 Last

| Item | Item Description | Evaluation Type | Rating | Score | Points | Required |
|-------------------------------|------------------|-------------------|-------------|-------|--------|--------------------------|
| Teamwork and cooperation | Proficiency | Approved/Official | | | 5 | <input type="checkbox"/> |
| Develop & implement solutions | Proficiency | Approved/Official | 4-Very Good | 4 | 5 | <input type="checkbox"/> |

▼ **Degrees**

Content Items Details Customize | View All First 1 of 1 Last

| Item | Item Description | Rating | Score | Points | Required |
|------------------|------------------|--------|-------|--------|--------------------------|
| Bachelor of Arts | Degree | | 4 | 4 | <input type="checkbox"/> |

Rate Applicant page (1 of 2)

▼ Language Skills

Content Items Details
[Customize](#) | [View All](#) | [First](#) 1-2 of 2 [Last](#)

| Item | Item Description | Rating | Score | Points | Required |
|---------|----------------------|----------|-------|--------|----------------------------|
| English | Speaking Proficiency | 3 - High | | 3 | 3 <input type="checkbox"/> |
| English | Writing Proficiency | 3 - High | | 3 | 3 <input type="checkbox"/> |

▼ Memberships

Content Items Details
[Customize](#) | [View All](#) | [First](#) 1 of 1 [Last](#)

| Item | Item Description | Rating | Score | Points | Required |
|-------------------------------|------------------|--------|-------|--------|--------------------------|
| North American Payroll Assoc. | Membership | | | 4 | <input type="checkbox"/> |

▼ Tests/Examinations

Content Items Details
[Customize](#) | [View All](#) | [First](#) 1 of 1 [Last](#)

| Item | Item Description | Rating | Score | Points | Required |
|---------------------|------------------|--------|-------|--------|--------------------------|
| Personality Profile | Test | | | | <input type="checkbox"/> |

[Save](#)
[Cancel](#)
[Previous Applicant](#)
|
[Next Applicant](#)
|
[Return to Previous Page](#)

Rate Applicant page (2 of 2)

Use this page to review the applicant's ratings for the those job opening qualifications that are included in a screening level.

Important! You cannot use this page to enter applicant ratings, only to review them and, importantly, to see if the ratings are missing. To enter applicant ratings, use the Application Details page, where you must add the content items that are used in screening.



Click the Application icon to access the Application Details page, where you can enter the missing ratings.

Return to Previous Page Click to return to the Screen Applicants - View Applicants page.

Previous Applicant and **Next Applicant** Use these links to scroll through the data for all of the applicants who are listed on the Screen Applicants page.

Screening Levels

Use the links in the section title bar to scroll through the screening levels for the job opening.

This section contains grids for each content item that is included in the job opening template, regardless of whether the screening level includes any qualifications for that content item. For example, if the job opening template includes the Honors and Awards content item, then an Honors and Awards grid appears, regardless of whether you screen for honors and awards and regardless of whether the job opening even lists any honors or awards.

<Content Item>

The grid titles correspond to the name of each content type.

| | |
|----------------------------------|--|
| Item and Item Description | Describes the specific qualification being used by the screening process. |
| Application | Click to access the Application Details page, where you can add missing qualifications or ratings. |
| Rating | If the content type uses a rating scale, this column displays the applicant's rating. This field is empty for content types that do not have a rating scale. |
| Points | Displays the number of points awarded for a qualification. The point value for a qualification comes from the Job Opening Screening Criteria page, where you configured job-specific requirements for a screening level. |
| Required | Displays a selected check box if the qualification is marked required on the Job Opening Screening Criteria page. The check box is deselected if the qualification is not required. |

Running Screening Levels and Applying Results

This section provides an overview of screening level processing and discusses how to:

- Review screening levels.
- Review and edit screening criteria.
- Run screening levels.
- Review and apply screening results.
- Review score details for a screening level.
- Review questionnaire details.
- Apply results.

Understanding Screening Level Processing

This overview discusses how you run screening levels and apply the results.

Reviewing and Editing Screening Level Criteria

The applicant screening pages provide access to a detail page where you can review the criteria and processing rules for each screening level. You can also modify screening criteria on this page.

Running Screening Levels

You can run screening levels using the Screen Applicants, Screening Levels, and Screening Results pages. Make sure to run screening levels in the proper order (the order in which they appear on the Screen Applicants page).

Note. You cannot run screening levels for prescreening or online screening. These run automatically when applicants apply online using PeopleSoft Candidate Gateway. If the job opening has these screening levels, the system has already run these levels and applied the results for any applicant who applied online. (These levels are not relevant to applicants who apply using other methods.)

If the general screening settings for the job opening indicate that applicants must pass the previous level (this setting is in the Applicant Screening group box on the Job Opening page), the system filters out applicants who have not passed the previous screening level before performing any actual screening.

When you run a screening level, the RS-Job Opening Screening (HRS_JO_SCR) Application Engine process uses the settings on the Job Opening Screening Criteria page as it performs the following tasks for each included applicant:

1. Evaluates whether the applicant has the attributes that you have selected as screening criteria.
2. Awards the specified number of points for each screening criterion that the applicant meets.

In U.S. federal implementations, the system keeps track of which attributes are marked as Augment or Selective so that the point subtotals for those types of criteria are available to use during the ranking process.

3. Adds the points earned for individual items to produce a cumulative point total.

This value represents the applicant's *raw points* for the screening level.

4. Evaluates whether the applicant passes or fails the screening level.

Applicant can fail a screening level if they have not earned enough points or if they do not meet criteria that was designated as required.

Screening levels can be configured to allow users to manually override the pass/fail status that the system assigns.

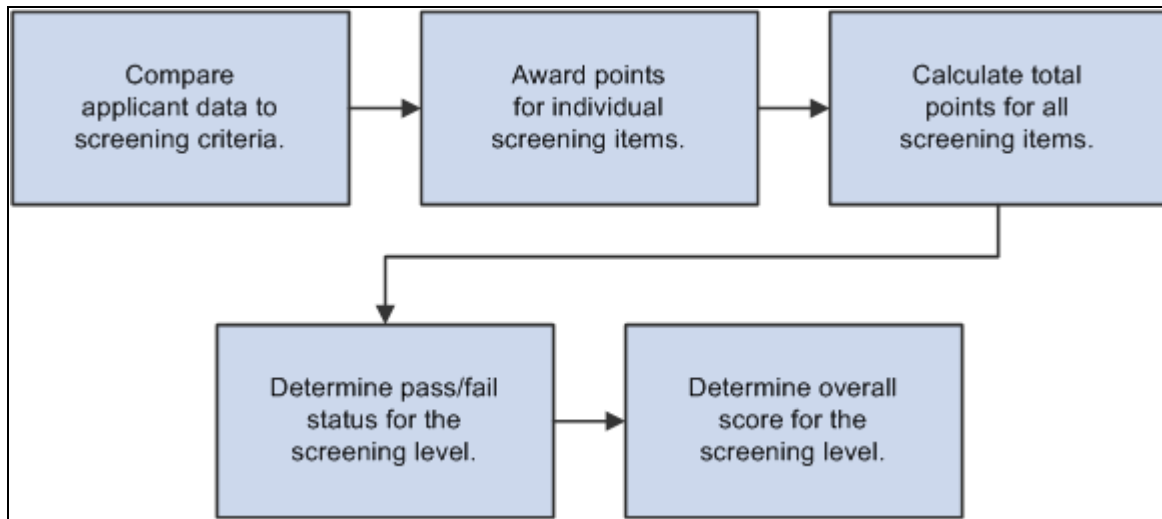
5. Assigns the applicant a final overall score for the screening levels.

Depending on the screening rules, the overall score might be the same as the raw points.

U.S. federal screening processes, however, use other scoring methods such as fixed scores for passing or failing or transmutation to a predetermined maximum based on the proportion of points earned to total available points.

See [Chapter 10, "Creating Job Openings," Defining Screening Level Rules and Criteria, page 270.](#)

The following diagram illustrates the process flow for the RS - Job Opening Screening process:



Screening level processing

When the screening process is complete, the system sends notifications to members of the screening notification team for the job opening.

See [Chapter 10, "Creating Job Openings," Identifying Recruiting Team Members for a Job Opening, page 282.](#)

Reviewing and Applying Screening Results

After the screening levels have been run, review the results on the Screening Results page. If you are satisfied, you can apply those results by clicking Apply Results button.

When you apply results, the system performs these actions:

- Updates the applicants' dispositions according to the settings in the screening level definition.

There are separate settings for applicants who pass and who fail the screening level.

- Creates rejection letters for applicants who fail the screening level.

This occurs if the screening level criteria identifies a letter to send. Depending on the screening level settings, the letter is either sent as an email attachment or added to the queue for the HRS Letter Generation (HRSLETTER) Application Engine process.

See [Chapter 19, "Managing Applicants," Generating Batch Recruitment Letters, page 602.](#)

- Updates the applicant data to show that the screening results have been applied.

Results are applied for every applicant who has screening results. If an applicant has results for multiple screening levels, the system uses the disposition settings and rejection letter settings from the last screening level.

Once results are applied for an applicant, that applicant is excluded from any subsequent runs of the screening level process. Therefore, after you apply results, the only reason to run additional screening levels is if new applicants have been linked to the job opening.

Note. Even after results are applied, you can continue to screen applicants who are subsequently added to the job opening.

Pages Used to Run and Apply Screening Levels

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|--------------------|------------------------|---|--|
| Screening Levels | HRS_JO_SCR_LVL | <p>Recruiting, Find Job Openings, Find Job Openings</p> <p>Click the job opening link in the Search Results group box on the Find Job Openings page.</p> <p>Click the Screen Applicants link on the Job Opening page: Manage Applicants tab.</p> <p>Click the View Screening Levels link on the Screen Applicants page.</p> | View screening levels associated with the job opening. |
| Screening Criteria | HRS_JO_SCR_DTL | Click a Screen Level Name link on the Screening Levels page. | Edit the screening criteria. |
| Screening Results | HRS_JO_SCR_RSLT | Click the View Screening Results link on the Screen Applicants page. | <p>Review the results of the screening process.</p> <p>You can access this page only after running a screening level.</p> |
| Screening Details | HRS_APP_SCR_RSLT | Click the value in the Score column on the Screening Results page. | Review how many total points the applicant earned in the screening level and how many points were awarded for each type of screening criteria. |


| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|----------------------------|------------------------|--|--|
| Questionnaire Results page | HRS_VIEW_QSTN_RSLT | Click the View Questionnaire Results link on the Screening Details page. | Review the applicant's answers to the online questionnaire that was completed during the online application process. |

Reviewing Screening Levels


Access the Screening Levels page (click the View Screening Levels link on the Screen Applicants page).

Job Opening

Screening Levels


 [Print Job Opening](#)

| | | | |
|---------------------|------------------------|-----------------|----------|
| Posting Title: | Web Developer | Job Opening ID: | 10041 |
| Job Opening Status: | 010 Open | Job Type: | Standard |
| Position Number: | 19143002 Web Developer | | |
| Business Unit: | NSWBU Swiss Hotels | | |
| Job Family: | | | |

 Save
[Return to Job Opening](#)

[View All Applicants](#) | [View Screening Levels](#) | [View Screening Results](#)

Run:

[Process Monitor](#) 

Job Opening / Jobs
Find | [View All](#) | First 1 of 1 Last

| | | |
|-----------------|--------|---------------------|
| Job Opening ID: | 10041 | Web Developer |
| Job Code: | N00037 | 004 - Web Developer |

| Screening Levels | | | |
|-----------------------------|------------------|----------------|-----------------|
| Screen Level Name | Last Run Date | Submitted By | Results Applied |
| Preliminary | 08/29/09 12:48PM | Betty Locherty | No |
| Final | | | |

Run:

Select All
Deselect All
Route Applicant
Merge Applicant

Screening Levels page

Job Opening / Jobs

This group box displays information about the job opening. If there are multiple jobs associated with the job opening, you can scroll to see each one.

Screening Levels

Screen Level Name Identifies the screening level. Click the link to access the Screening Criteria page, where you can review and update the screening configuration.

Note. If the screening level is for prescreening or online screening, and if any applicants have already applied, the name is no longer a link because you can no longer modify the criteria from the screening pages.

Last Run Date and Submitted By These fields display information about the last time the screening level was processed.


Results Applied For screening levels that have run at least once, this field displays *Yes* or *No* to indicate whether the screening results have been applied. The field is blank for screening levels that you have not yet run.

Reviewing and Editing Screening Criteria

Access the Screening Criteria page (click a Screen Level Name link on the Screening Levels page).

Screening Levels

Screening Criteria

 [Print Job Opening](#)

Posting Title: Admin Assistant Job Opening ID: 30040
Job Opening Status: 010 Open Job Type: Standard
Position Number: LEP00032 Administrative Assistant
Business Unit: LEBU Federal Planning & Analysis
Job Family:

Screening Option Description

Name: Quality Ranking 1003
Pass Status:
Pass Reason:
Fail Status:
Fail Reason:
Letter:
 Send Letter as Email When Results Are Applied

Scoring Definition

Assign Points

Percent Needed to Pass: Use Raw Points
Maximum Points to Assign:
Points Assigned for Pass: Points Assigned for Fail:

Manually Assign Status

Screening Criteria page (1 of 2)

| Screening Requirements | | | | | | | | |
|--------------------------------|--|---------------------------------|------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|-----------|
| Description | Item | Description | Edit Details | Find Use in Screening | Required | Augment | Selective | Points |
| General Requirement | Regular / Temp : Regular | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 0 |
| General Requirement | Full / Part Time : Full-Time | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 0 |
| General Requirement | Standard Hours : 40 | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 0 |
| General Requirement | Shift : N | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 0 |
| General Requirement | Travel Percent : <= 25% | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 0 |
| General Requirement | Minimum Salary : 41233 - Year | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 0 |
| General Requirement | Minimum Age : 18 | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 0 |
| General Requirement | Citizenship Status : 1 | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 0 |
| General Requirement | Minimum Grade : 07 | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 0 |
| Education & Experience | Education: HS Graduate or Equivalency, 0 | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 0 |
| Screening Question | Question: Overtime | | Edit Details | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 0 |
| Competencies | Ability to prioritize tasks | Approved/Official - Proficiency | Edit Details | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 5 |
| Language Skills | English | Language | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 5 |
| Tests/Examinations | General Clerical Skills | Test | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 5 |
| Total Screening Points: | | | | | | | | 15 |

Screening Criteria page (2 of 2)

This page is the same as the Job Opening Screening Criteria page where the screening level was originally configured.

You can also modify screening criteria on this page. However, to add additional qualifications to the screening criteria, you must first go to the Job Opening page and add the qualification to the job opening itself.

See [Chapter 10, "Creating Job Openings," Defining Screening Level Rules and Criteria, page 270.](#)

Running Screening Levels

To run a screening level:

1. Access the Screen Applicants page, the Screening Levels page, or the Screening Results page.
 - a. Select Recruiting, Find Job Openings, Find Job Openings.
 - b. Click the job opening link in the Search Results group box on the Find Job Openings page.
 - c. Click the Screen Applicants link on the Job Opening page.
 - d. Optionally click the links to move to the Screening Levels page or the Screening Results page.
2. Select the screening level in the Run field
3. Click the Go button.

See Viewing Applicants Linked to Job Openings

Reviewing and Applying Screening Results

Access the Screening Results page (click the View Screening Results link on the Screen Applicants page).

Job Opening

Screening Results


Posting Title: Data Entry Clerk (Federal Operations - Salaried Transmutation)

Job Opening Status: 010 Open

Position Number: 19000022 Data Entry Clerk

Business Unit: GBIBU Global Business Institute BU

Job Family:

 [Print Job Opening](#)

Job Opening ID: 603314

Job Type: Standard

 [Save](#)
[Return to Job Opening](#)

[View All Applicants](#)
[View Screening Levels](#)
[View Screening Results](#)

Run:

[Process Monitor](#) 

Screening Results page (1 of 2)

Screening Results Find | View All | First 1 of 1 Last

Job Opening ID: 603314 Data Entry Clerk (Federal Operations - Salaried Transmutation)
Job Code: 290030 003 - Clerk-Data Entry

Screening Levels Find | View All | First 1 of 2 Last

Screening Level: [Minimum Qualifications](#)

Applicants Customize | Find | First 1-5 of 5 Last

Result Applicant Data

| | Score | Points | Name | ID | Disposition | Screening Result | Rate | Results Applied | Competitive Status |
|--------------------------|---------------------|--------|--------------------------------|-----|-------------|------------------|----------------------|-----------------|--------------------|
| <input type="checkbox"/> | 91% | 70.0 | Terry Shadbolt | 4 | 030 Screen | Passed | Rate | No | Competitive |
| <input type="checkbox"/> | 55% | 70.0 | Jim Furlong | 17 | 030 Screen | Passed | Rate | No | Competitive |
| <input type="checkbox"/> | 36% | 0.0 | Celia Cruise | 94 | 110 Reject | Failed | Rate | No | |
| <input type="checkbox"/> | 18% | 0.0 | Juan Gonzalez | 297 | 110 Reject | Failed | Rate | No | |
| <input type="checkbox"/> | 36% | 0.0 | Rashada Moore | 299 | 110 Reject | Failed | Rate | No | |

Competitive Status:

Run:

[Select All](#) [Deselect All](#) [Route Applicant](#) [Merge Applicant](#)

Screening Results page (2 of 2)

Note. When multiple job codes are defined on the job opening, the Screening Results group box has multiple scroll levels, allowing each job code to be viewed after processing a given screening level. When a screening level is processed, it runs against all job codes that have screening criteria defined.

Run and Go Select the screening definition you want to run, and click the Go button to run it.

(USF) Rank Applicants Click to access the Rank Applicants page.

Screening Levels

Use this group box to view information and results for each screening level. Prescreening and online screening levels do not appear here.

Screening Level Click the screening level name link to access the Screening Criteria page, where you can review and optionally update the screening level configuration.

Apply Results

Click to apply the most recent screening results. When you apply results, the system updates the applicants' dispositions according to the settings in the screening level definition.

If you apply results after running multiple screening levels, the system updates the applicants' dispositions based on the results of the last screening level.

If there are multiple job codes associated with the job opening, the system updates the applicants' dispositions using the most advantageous disposition available.

Applicants: Result Tab

This grid displays the screening results for each applicant linked to the job opening.

Score

Displays the percent of the maximum possible score that the applicant earned. Click the link to access the Screening Details page, where you can see how many points the applicant earned for various types of screening criteria.

Points

Displays the overall screening points that the applicant earned for the screening level. Depending on the screening level configuration, this could be the raw points that the applicant earned, or it could be a fixed number that is associated with a pass or fail status.

Disposition

Displays the applicant's current disposition for the job opening. When you apply screening results, the system updates this disposition.

Screening Result

Indicates whether the applicant passed or failed the screening level.

If Manually Assign Status is selected on the Screening Criteria page, then you can change the status. Otherwise, this field is read-only.

Rate

Click this link to access the Rate Applicant page, where you can review applicant ratings for rated content types. The Rate Applicant page provides links to the Application Details page so that you can add any missing ratings.

Results Applied

Displays *Yes* or *No* to indicate whether you have applied results. After you apply results, you cannot reprocess the same applicants.

Applicants - Applicant Data Tab

Access the Applicant Data tab.

| Applicants | | |
|--|------------|--------------------|
| Customize Find First 1-5 of 5 Last | | |
| Result Applicant Data | | |
| Name | Date | Type |
| Jan Bradley | 06/22/2009 | External Applicant |
| Terry Shadbolt | 06/22/2009 | External Applicant |
| Rosanne Stocker | 06/22/2009 | External Applicant |
| Jim Furlong | 06/22/2009 | External Applicant |
| Theresa Kelsey | 06/22/2009 | External Applicant |

Competitive Status:

Screening Results page: Applicant Data tab

This grid displays additional information about the applicants for whom screening results exist, including the date the applicant was last screened.

Page Elements for Performing Applicant Actions

On the Result tab in the Applicants grid, the first column is a check box that you select to choose applicants to be included when you use these page elements.

Competitive Status and Go Use these fields to assign each applicant a competitive status. Select one or more applicants, choose the status to apply, then click the Go button.

The available statuses are *Competitive*, *Non-Competitive Other*, or *Noncompetitive VRA* (noncompetitive veterans recruitment appointment).

Route Applicant Click this link to route the selected applicants.

See [Chapter 13, "Screening and Routing Applicants," Routing Applicants, page 417.](#)

Merge Applicant Click this link to access the Review Duplicate Applicants page, where the selected applicants appear as a set of duplicates for you to review and optionally merge.

See [Chapter 19, "Managing Applicants," Identifying and Merging Duplicate Applicant Records, page 628.](#)

Note. When you run a screening level, the system does *not* limit screening to selected applicants.

Reviewing Score Details for a Screening Level

Access the Screening Details page (click the value in the Score column on the Screening Results page).

Screen Applicants

Screening Details

Terry Shadbolt

Applicant ID: 4

[Return to Previous Page](#)

| Job/Job Opening Summary | | Find View All First 1 of 1 Last |
|-------------------------|--------|--|
| Job Opening ID: | 603314 | Data Entry Clerk (Federal Operations - Salaried Transmutation) |
| Job Code: | 290030 | 003 - Clerk-Data Entry |

| Screening Level Summary | | Find View All First 1 of 1 Last |
|-------------------------|------------------------|---|
| Screening Level: | Minimum Qualifications | |
| Screening Points: | 50.0 | Level Score: 70.0 |
| Screening Status: | Passed | Status Date: 08/29/2009 |
| Status Reason: | | |

| Level Points Detail | | | |
|-----------------------|----|-----------------------------|-----|
| General Requirements: | 30 | Augmentation Points: | 0.0 |
| Education/Experience: | 10 | Selective Factor Points: | 0.0 |
| JPM Content Score: | 10 | Veterans Preference Points: | 0 |
| Screening Questions: | 0 | | |

[Return to Previous Page](#)

Screening Details page

This page provides the summary information about the points that an applicant earned for a specific screening level.

Screening Level Summary

This section has one row of data for each screening level that you've run for the applicant.

Screening Level Identifies the screening level whose results you are examining. Scroll to see results for other screening levels.

Screening Points Displays the points that the applicant earned for meeting this screening level's criteria.

| | |
|-------------------------|--|
| Level Score | Displays the applicants overall score for the screening level. For example, if a screening level awards 70 points for passing, this field displays 70. |
| Screening Status | Indicates whether the applicant <i>Passed</i> or <i>Failed</i> the screening level. |
| Status Date | Displays the most recent date that the applicant was screened with this screening level. |
| Status Reason | If the applicant failed the screening level, this field displays an explanation such as <i>Applicant failed minimum screening level percent requirement.</i> |

Level Points Detail

This group box breaks down the sources of the applicant's raw points.

| | |
|---|---|
| General Requirements | Displays the number of points that the applicant received for meeting General Information screening criteria. |
| Education/Experience | Displays the number of points that the applicant received for meeting Education & Experience screening criteria. |
| JPM Content Score (job profile management content score) | Displays the number of points that the system awarded to the applicant based on profile content type qualifications such as competencies, languages, and degrees. |
| Screening Questions | Display the number of points that the system awarded based on the applicant's responses to screening questions. |

Note. The system does not award any points for unanswered questions or for open-ended questions that have been answered but not yet evaluated. Click the View Questionnaire Results link to ascertain whether either of these conditions is true and whether you need to send reminders to applicants or evaluators.

| | |
|-----------------------------------|--|
| View Questionnaire Results | Click to access the Questionnaire Results page, where you can view the applicant's responses to screening questions. |
|-----------------------------------|--|

(USF) Additional Federal Screening Data

These fields in the Level Points Detail group box appear only in federal systems.

| | |
|--------------------------------------|---|
| (USF) Augmentation Points | Displays the number of points that the applicant received for screening items that were marked as Augment on the Job Opening Screening Criteria page. These are included in the total point for the screening level. |
| (USF) Selective Factor Points | Displays the number of points that the applicant received for screening items that were marked as Selective on the Job Opening Screening Criteria page. These are included in the total point for the screening level. |

(USF) Veterans Preference Points

Displays the number of veterans preference points that the system awards based on the applicant's veterans preference code.

These points are not associated with any particular screening level, so although they are displayed in the summary for each screening level, they are *not* included in the total points for the screening level. They are added to the applicant's cumulative screening score on the Rank Applicants page.

Reviewing Questionnaire Details

Access the Questionnaire Results page (click the View Questionnaire Results link on the Screening Details page).

Screen Applicants

Questionnaire Results

Orla Dooley

Applicant ID: 300159

Screening Level: Preliminary

[Return to Previous Page](#)

CORRECT **Are you willing to work overtime periodically ?**

| Screening Questions | | |
|-------------------------------------|-----|---|
| <input type="checkbox"/> | No | |
| <input checked="" type="checkbox"/> | Yes | 2 |

OPEN ENDED **Please discuss in a short essay the protocols you would establish in a newly formed Burns Unit in a rural hospital.**

| Screening Questions | |
|---|--|
| 1. Treatment protocols. | |
| 2. Privacy protocols. | |
| 3. Hiring protocols | |
| 4. Additional administrative protocols. | |

Subtotal: 2

Questionnaire Results page

Review the questions that were included in screening.

For multiple-choice questions, the page shows which answer or answers the applicant chose and how many points those answers are worth.

For open-ended questions, the page shows the applicant's answer and how many points the applicant earned for that answer. If there are no points shown, then no evaluations have been submitted.

Applying Results

Access the Screening Results page (click the View Screening Results link on the Screen Applicants page).

See [Chapter 13, "Screening and Routing Applicants," Reviewing and Applying Screening Results, page 401.](#)

Once you have reviewed the screening results and are satisfied with them, you can click the Apply Results button to finalize the result and update applicant dispositions accordingly.

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

(USF) Ranking Applicants and Generating the Certificate of Eligibles

This section provides an overview of the federal ranking process and discusses how to:

- Assign competitive and noncompetitive statuses.
- Rank applicants.
- Review cumulative score details.
- Generate the Certificate of Eligibles.
- Print the Certificate of Eligibles.

Understanding The Federal Ranking Process

This overview describes the federal ranking process

Competitive/Noncompetitive Status

All applicants must have a competitive/noncompetitive status in order to be included in the final applicant ranking. Competitive/noncompetitive status is a person's basic eligibility for assignment to a position in the competitive service without having to compete with members of the general public in an open competitive examination.

The available statuses are *Competitive*, *Non-Competitive Other*, or *Noncompetitive VRA* (noncompetitive veterans recruitment appointment).

Assign statuses on the Screening Results page before you access the Rank Applicants page to begin the ranking process. The Rank Applicants page lists only applicants who have been assigned a status.

Applicant Classification

The Rank Applicants page displays a screening score for each applicant. The score is the sum of the applicant's scores for individual screening levels and any veterans preference points.

As you begin the ranking process, you determine the score thresholds that the system uses to classify candidates as qualified, well-qualified, or best-qualified.

The system then considers these qualification classifications along with the applicants's priority processing status and places applicants in these four categories:

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

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

There are separate rules for competitive applicants and noncompetitive applicants. So, for example, you might include all four categories for noncompetitive applicants, but only the first three categories of competitive applicants.

Tie-Breakers

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

- Augmenting Factors, which uses criteria identified as Augmenting on the screening criteria.
- Name Request, which gives priority to applicants whose name are listed in the Candidate Name Request grid on the job opening.
- Random Number, which uses an algorithm based on the number that you entered in the Tie Breaker Number field in the Federal group box in the screening options section of the job opening.

Certificate of Eligibles

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

Pages Used to Rank Applicants and Generate the Certificate of Eligibles

| Page Name | Definition Name | Navigation | Usage |
|---------------------------|------------------|--|---|
| Screening Results | HRS_JO_SCR_RSLT | <p>Recruiting, Find Job Openings, Find Job Openings</p> <p>Click the job opening link in the Search Results group box on the Find Job Openings page.</p> <p>Click the Screen Applicants link on the Job Opening page: Manage Applicants tab.</p> <p>Click the View Screening Results link on the Screen Applicants page.</p> | <p>Review the results of the screening process.</p> <p>Note. You can access this page only after running a screening level.</p> |
| Rank Applicants | HRS_JO_RANK | Click the Rank Applicants button on the Screening Results page. | Rank applicants. |
| Rank Applicants (details) | HRS_APP_RNK_RSLT | Click the value in the Score column on the Rank Applicants page. | Review how many total points the applicant earned across all screening levels and through preference items, and review a breakdown of this number by screening level and by type of screening criteria. |
| Certificate of Eligibles | HRS_G_CRT_ELG | Recruiting, Administration, Certificate of Eligibles, Certificate of Eligibles | Set up a certificate of eligibles. |
| Certificate of Eligibles | HRS_RUN_HRS821 | Recruiting, Reports, Certificate of Eligibles, Certificate of Eligibles | Print a certificate of eligibles. |

Assigning Competitive and Noncompetitive Statuses

Access the Screening Results page (click the View Screening Results link on the Screen Applicants page).

See [Chapter 13, "Screening and Routing Applicants," Reviewing and Applying Screening Results, page 401.](#)

To assign competitive or noncompetitive statuses:

1. In the Competitive Status field, select the status to assign: *Competitive*, *Non-Competitive VRA*, (noncompetitive veterans recruitment appointment) or *Non-Competitive Other*
2. Click the check box in the rows for the applicants who are to be assigned the selected status.

- Click the Go button next to the Competitive Status field.


The system assigns the statuses, which now appear in the Competitive Status column of the Applicants grid.

Ranking Applicants

Access the Rank Applicants page (click the Rank Applicants button on the Screen Applicants page).

Screen Applicants

Rank Applicants

 [Print Job Opening](#)

| | | | |
|----------------------------|-----------------------------------|------------------------|----------|
| Posting Title: | Admin Assistant | Job Opening ID: | 30040 |
| Job Opening Status: | | Job Type: | Standard |
| Position Number: | LEP00032 Administrative Assistant | | |
| Business Unit: | LEBU Federal Planning & Analysis | | |
| Job Family: | | | |

[Return to Previous Page](#)

Applicants
Find | View All | First 1 of 2 Last

| | | | |
|------------------------|--------|---|--|
| Job Opening ID: | 30040 | Admin Assistant | |
| Job Code: | LEJ006 | GS - 0318 - 07 - Administrative Assistant | |

Competitive
Customize | Find | View All | First 1 of 1 Last

| Rank | Score | Points | Category | Weight | Name | ID | Date | Qualifications Determination |
|--------------------------|-------|--------|----------|--------|--------------------------------|------|------------|------------------------------|
| <input type="checkbox"/> | 97% | 56.0 | | | Kerry O'Reilly | 1042 | 02/15/2005 | Eligible/Not Rated |

Noncompetitive
Customize | Find | View All | First 1 of 1 Last

| Rank | Score | Points | Category | Weight | Name | ID | Date | Qualifications Determination |
|--------------------------|-------|--------|----------|--------|-----------------------------|------|------------|------------------------------|
| <input type="checkbox"/> | 86% | 50.0 | | | Jose Campos | 1022 | 02/15/2005 | Eligible/Not Rated |

Rank Applicants page (1 of 2)

Qualify Applicants

Best Qualified Score: Well Qualified Score:

Create Certificates

Applicants to Consider: Certificate Number:

Tie Breaker

Tie Breaker Option:

[Return to Previous Page](#)

Rank Applicants page (2 of 2)

Competitive and Noncompetitive

These grids list the applicants from the job opening; applicants are segregated according to the competitive status that you manually assigned on the screening pages. The Noncompetitive grid includes applicants with either of the two noncompetitive statuses.

- Rank** Initially this field is blank. When you qualify the applicants (by entering the thresholds for best qualified and well qualified and then clicking the Qualify Applicants button), the system assigns a ranking to the applicant. This field can be overridden.
- Score** Displays the percent of the maximum points that the applicant attained. The maximum point value is manually entered on the screening section on the Job Opening page; there is no requirement for it to be the true maximum amount of points possible.

Click the score to access a detail page that shows a breakdown of how the points were earned, both by screening level and by screening criteria type.
- Points** Displays the total points that the applicant accumulated during the screening process, including veteran's preference points.

| | |
|-------------------------------------|---|
| Category | <p>Indicates which of four applicant categories the applicant belongs to. These categories are based on a combination of the applicant's priority placement status for the job opening and the applicant's qualification classification (best qualified, well qualified, or qualified).</p> <p>See Chapter 13, "Screening and Routing Applicants," Applicant Classification, page 408.</p> <p>This column is blank when you begin the ranking process. This is because the qualification classification is not set until you enter score thresholds and click the Qualify Applicant button. After you click the Qualify Applicant button, the system updates the Competitive and Noncompetitive grids with each applicant's qualification determination and category.</p> |
| Weight | <p>Displays the weight factor from the applicant's priority placement code. The weight does not affect the score; it is used to prioritize which priority placement code to use when an applicant has more than one.</p> |
| Name and ID | <p>These fields identify the applicant. Click the name link to access the Manage Applicant page.</p> |
| Date | <p>Displays the date that the applicant was added to the list of competitive or noncompetitive applicants.</p> |
| Qualifications Determination | <p>Displays the applicant's qualification level.</p> <p>Before you click the Qualify Applicants button, the value is <i>Eligible/Not Rated</i>.</p> <p>After you click the Qualify Applicants button, the value is <i>Qualified</i>, <i>Well Qualified</i>, or <i>Best Qualified</i>, depending on where the applicant's score falls with regards to the thresholds that you enter in the Best Qualified Score and Well Qualified Score fields.</p> |

Qualify Applicants

Use this group box to set score thresholds for best qualified and well qualified applicants and to assign applicants a qualification status based on these thresholds.

| | |
|-----------------------------|---|
| Best Qualified Score | Enter the minimum score an applicant must achieve to be given a <i>Best Qualified</i> determination. |
| Well Qualified Score | Enter the minimum score an applicant must achieve to be given a <i>Well Qualified</i> determination. |
| Qualify Applicants | Click this button to assign qualification determinations to all applicants. Applicants with scores under the threshold for <i>Well Qualified</i> status are given the status <i>Qualified</i> . |

Create Certificates

This group box is used to process the Certificate of Eligibles.

- Applicants to Consider** Enter the number of applicants you want included in the certificate.
- Certificate Number** Enter the number of the certificate.
- Create Certificate** Click to process the certificate of eligibles.

Tie Breaker

If any of the applicants are tied, use this section to apply a tie breaker method.

- Tie Breaker Option** Select one of these tie-breaker methods:
- *Augment*: The winner of the tie is the applicant with more points earned for Augmenting criteria (criteria for which you selected the Augment check box on the Job Opening Screening Criteria page).
 - *Name Request*: Applicants listed on the Applicant Name Request page on the job opening win ties.
 - *Random Number*: The system breaks ties using an algorithm that uses a number that you enter in the Applicant Screening section of the Job Opening page. (Specifically, the number is in the Tie Break Number field in the Federal group box.)

- Apply Tie Breaker** Click this button to update the applicant rankings based on the selected tie-breaker method. If there are still ties after you apply one tie-breaker method, you can select another method and apply it.

Reviewing Cumulative Score Details

Access the Rank Applicants (details) page (click the value in the Score column on the Rank Applicants page).

Screen Applicants

Rank Applicants

Terry Shadbolt

Applicant ID: 4

[Return to Previous Page](#)

Job/Job Opening Summary Find | View All First 1 of 1 Last

| | | |
|------------------------|--------|--|
| Job Opening ID: | 603314 | Data Entry Clerk (Federal Operations - Salaried Transmutation) |
| Job Code: | 290030 | 003 - Clerk-Data Entry |

Screening Level Summary Find | View All First 1 of 3 Last

| | | | |
|--------------------------|------|---------------------|------|
| Grand Totals | | | |
| Screening Points: | 55.0 | Level Score: | 85.0 |

Level Points Detail

| | | | |
|------------------------------|----|------------------------------------|-----|
| General Requirements: | 35 | Augmentation Points: | 0.0 |
| Education/Experience: | 15 | Selective Factor Points: | 0.0 |
| JPM Content Score: | 15 | Veterans Preference Points: | 0 |
| Screening Questions: | 0 | | |

[Return to Previous Page](#)

Rank Applicants (details) page

This page, like the Screening Details page, shows the sources of the points that were awarded to applicants during the screening process. But whereas the Screening Details page shows details for a single screening level, this page includes a scroll area that you can use to access information for all screening levels. The first record in the scroll level, displays grand totals across all screening level.

Generating the Certificate of Eligibles

Access the Rank Applicants page (click the Rank Applicants button on the Screen Applicants page).

Click the Create Certificates button.

See [Chapter 13, "Screening and Routing Applicants," Ranking Applicants, page 411.](#)

Working With the Certificate of Eligibles

Access the Certificate of Eligibles administration page (Recruiting, Administration, Certificate of Eligibles, Certificate of Eligibles).

Certificate of Eligibles

Job Opening ID: 500409
Recruitment Type: Open Competition
Status Code: 010

Certificate of Eligibles Detail Find | View All First 1 of 1 Last

Job Code: 170005 - - 004 Primary + -

Certificate of Eligibles Nbr:

Certificate Status:

Certificate Source:

| | |
|---|--|
| Date of Request: <input type="text"/> | Date Received: <input type="text"/> |
| Due Date: <input type="text" value="07/19/2009"/> | Date Returned: <input type="text"/> |
| Date Sent to SO: <input type="text" value="06/19/2009"/> | Issue Date: <input type="text" value="06/19/2009"/> |
| Date Returned from SO: <input type="text"/> | Extension Date: <input type="text"/> |

Certificate of Eligibles administration page

Printing the Certificate of Eligibles

Access the Certificate of Eligibles report page (Recruiting, Reports, Certificate of Eligibles, Certificate of Eligibles).

Certificate of Eligibles

Run Control ID: qae [Report Manager](#) [Process Monitor](#)

Certificate of Eligibles Detail Find | View All First 1 of 1 Last

*Certificate of Eligible Number: 🔍

Job Opening ID:

Job Code:

Certificate of Eligibles report page

Enter the certificate number, then run the report.

Routing Applicants

This section provides an overview of applicant routing and discusses how to:

- Route applicants.
- Enter a routing recommendation and a final routing decision.

Understanding Applicant Routing

After the screening process has helped you evaluate applicants, you are ready to decide what to do next each applicant. *Routing* refers to both the decision about what to do next with the applicant and the act of sending other recruiting users a request to provide input on that decision.

Routing Decisions

The system uses statuses from the Route status area to describe the possible actions you can take for an applicant.

As delivered, the system includes these statuses for the Route status area:

- *Routed* indicates that the applicant has entered the routing phase and that you are seeking recommendations for further applicant processing.
- *Invite for Interview* indicates that you intend to proceed to the next step in the recruiting process by inviting the applicant to interview.
- *Hold* indicates that you do not intend to make a decision yet.
- *Reject* indicates that you are not interested in the applicant.
- *Withdrawn* indicates that the applicant is no longer available for the job opening.

The Route Applicant Action

Route Applicant is one of the predefined actions that Talent Acquisition Manager enables you to perform using the Take Action and Group Action fields that appear on several page.

When you initiate the *Route Applicant* action, the Route Applicant page appears. Use this page to list the people whose feedback you are requesting. When you submit the routing request, the system sends each recipient a notification with a link to the page where the recipient enters a response.

Routing has its own status, separate from the applicant's disposition. When you create a routing request, you also assign the initial routing status. As delivered, the default routing status is *Routed*, indicating that you have just begun the decision-making process.

See [Chapter 19, "Managing Applicants," Actions in the Take Action Field, page 559.](#)

Routing Recommendations and Final Decisions

The routing request page includes a Response field for each person to whom you are routing the applicant. This field is where the routing recipients select the routing status that they recommend. When creating a routing request, you leave this field blank for the routing recipient to complete.

The notification that the recipient receives includes a link to the Disposition Details - Route page, which displays the same recipient grid as the Route Applicant page. This is where the routing recipient enters a response.

The Disposition Details - Route page is also where a recruiter reviews the routing recommendations and updates the applicant's overall routing status when a final routing decision has been made.

When an applicant's overall routing status changes, rules for status change effects make related changes to the applicant's disposition.

Note. Only changes to the overall routing status trigger status change effects. The routing recommendations in the Response field do not have any effect on the applicant's disposition.

See [Chapter 4, "Setting Up Recruiting Statuses," Delivered Status Change Effects, page 41.](#)

Pages Used to Route Applicants

| Page Name | Definition Name | Navigation | Usage |
|------------------|------------------------|--|---|
| Route Applicant | HRS_GACT_APP_RTE | Recruiting, Find Applicants, Find Applicants Search for applicants, then in the Search Results grid, select <i>Route Applicant</i> in the Take Action field or the Group Action field. (This action is also available on other pages.) | Route an applicant to another employee to get a recommendation regarding the next step in the recruiting process. |

| Page Name | Definition Name | Navigation | Usage |
|-----------------------------|-----------------|--|--|
| Disposition Details - Route | HRS_APP_RCMNT | <ul style="list-style-type: none"> On the Manage Applicant page: Applicant Activity tab: Current Status section, click the link in the disposition column when the disposition is <i>Route</i>. Users who receive a routing request email can click the link in the email. | Users who receive routing requests use this page to enter a response to the request. Others users use this page to review routing information and enter a final routing determination. |

Routing Applicants

Access the Route Applicant - Route Applicant page (on the Find Applicants page, select *Route Applicant* in the Take Action field or the Group Action field).

Route Applicant

Route Applicant

Applicants Being Routed

| Applicant | Name |
|-----------|----------------|
| 4 | Terry Shadbolt |
| 112 | Gary Gold |

Routing Details

*Overall Routing Status: Status Date:

Status Reason:

Routings

| *Route Date | *Route To | Response Due | Response | Response Date | | |
|-------------|-------------|--------------|----------------------|-------------------------------|--|--|
| 06/11/2009 | Jake Oglevy | 06/18/200 | <input type="text"/> | <input type="text" value=""/> | | |

Route Applicant page

Applicants Being Routed

This grid lists the names and IDs of the applicants that you are routing.

Routing Details

| | |
|-------------------------------|--|
| Overall Routing Status | Select the initial value for the Route status area. As delivered, the default status in this area is <i>Routed</i> . See Chapter 4, "Setting Up Recruiting Statuses," Understanding Recruiting Statuses, page 35. |
| Status Date | Enter the date that the selected routing status is to be applied. The default value is the current date. |
| Status Reason | Optionally, select a reason for assigning the selected routing status. Values are available only if the definition of the selected status includes associated reasons. |

Routings

Use this grid to identify the people whose feedback you are requesting.

| | |
|-----------------------------------|--|
| Route Date | The system enters the current date. |
| Route To | Enter the name of the person to whom you are routing the applicant. |
| Response Due | Enter a date by which the recipient should respond with a recommendation regarding the applicant. |
| Response and Response Date | When routing applicants, leave this field blank. The person who receives the routing completes these fields to enter a routing recommendation, but does so on the Disposition Details - Route page rather than here. |

Action Buttons

| | |
|---------------|---|
| Submit | Click to complete the routing action. The system sends a notification (HRS_APP_RTE) to each person listed in the Routings grid. |
| Cancel | Click to cancel the routing action and return to the previous page. |

Entering Routing Recommendations and a Final Routing Decision

Access the Disposition Details - Route page (on the Manage Applicant page: Applicant Activity tab: Current Status section, click the link in the disposition column when the disposition is *Route*.)

Note. Users who receive a routing request can access this page using the link in the email.

Manage Applicant: [Cindy Lee](#)

Disposition Details: Route

Applicant Name: [Cindy Lee](#)

ID: 1016

Date Entered: 09/28/2004

[Print Job Opening](#)

Posting Title: Senior Financial Analyst

Job Opening Status:

Job Title: Analyst-Financial Sr

Position Number: 19000070 Sr Financial Analyst

Business Unit: GBIBU Global Business Institute BU

Job Family: KFIN Finance

Job Opening ID: 30018

Job Type: Standard

Job Code: 140040

[Return to Previous Page](#)

Routing Details

Overall Routing Status: **Status Date:**

Status Reason:

Activity Routing Information

| *Route Date | *Route To | Response Due | Response | Response Date | | |
|---|--|---|--|---|----------------------------------|----------------------------------|
| <input type="text" value="09/28/2004"/> <input type="button" value="31"/> | <input type="text" value="Jean Parsons"/> <input type="button" value="m"/> | <input type="text" value="10/15/2004"/> <input type="button" value="31"/> | <input type="text" value="Invite"/> <input type="button" value="v"/> | <input type="text" value="09/28/2004"/> <input type="button" value="31"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |

Disposition History

| Disposition | Status | Reason | Status Date | Offer ID |
|-----------------------|------------|--------|-------------|----------|
| Route | 010 Routed | | 09/28/2004 | |

[Return to Previous Page](#)

Disposition Details - Route page

Routing Details

This group box is identical to the Routing Details section of the Route Applicant page.

Overall Routing Status Update the overall routing status when you decide what step to take next for this applicant.

Response and Response Date The routing recipient named in the Route To field enters a recommended overall routing status and the date of the recommendation. The current date is the default response date.

The system does not restrict access to these fields, so any user with the ability to update this page can enter a response on behalf of any routing recipient.



Use the Add and Delete buttons to change the list of routing recipients. The system does *not* notify recruiters that you add to the list using these buttons. To ensure that the routing recipients receive the notification, you need to use the *Route Applicant* action to create an additional routing.

Disposition History

This grid displays a row for each time the applicant has been routed. The data in the grid matches the data from the routing details for the routing. The text in the Disposition column is a link that you click to see the routing details associated with a specific routing action.

See Also

[Chapter 19, "Managing Applicants," Reviewing Disposition Details, page 571](#)

Chapter 14

Interviewing Applicants

This chapter describes how to:

- Maintain interview facilities.
- Schedule interviews.
- Complete interview evaluations.
- Finalizing interviews and sending evaluation reminders.
- Make final recommendations.
- Review interview schedules and evaluations.

Maintaining Interview Facilities

Interview facilities are specific locations such as meeting rooms where interviews take place. In the context of an applicant's interview schedule, the facility is referred to as the *venue*. If integration with Microsoft Outlook calendaring is active, the interview facility corresponds to a Microsoft Outlook resource.

Page Used to Maintain Interview Facilities

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|----------------------|------------------------|--|--|
| Interview Facilities | HRS_VENUE_PG | Recruiting, Administration, Interview Facilities, Interview Facilities | Maintain information about interview venues. |

Maintaining Interview Facilities

Access the Interview Facilities page (Recruiting, Administration, Interview Facilities, Interview Facilities).

Interview Facilities



Venue Information



Venue ID: 1

Status: Active

Description:



*Email:


Location:  

Directions:  

Notes:

Room Details:

Attachments Customize | Find | View All |  First  Last

| | File Name | Description | Last Updated | Last Updated By | Delete |
|---|-------------------------|-------------|--------------------|-----------------|--|
| 1 | Map.doc | Map.doc | 05/26/2009 11:03PM | PS |  |

[+ Add Attachment](#)

Interview Facilities page

Venue Information

- Venue ID** Displays a unique identifier that the system assigns when you create the venue.
- Status** Select *Active* or *Inactive* to indicate whether the venue is available for use on the Schedule Interview page.
- Description** Enter the description that users see when selecting this venue to use for an interview.
- Email** Enter the email address that is assigned to the Microsoft Outlook resource that corresponds to this venue. If you use full calendar integration, the system uses this email address to identify the venue, confirm its availability, and reserve it for the interview meeting. If you use partial calendar integration or no calendar integration, the email address is informational only.

| | |
|-------------------------------|--|
| Location | Enter the specific location of the venue. When a recruiter adds a venue to an interview, the system copies the location information to the interview schedule. If the recruiter modified the location text in the actual interview schedule, the changes are replicated to the venue definition. |
| Directions | Enter directions to the venue. The text that you enter is included in the notifications that the system sends to interview participants, including the notification that applicants receive through Candidate Gateway. |
| Notes and Room Details | Enter any additional useful information about the venue. Information in these fields does not appear on the Interview Schedule page. However, users can access the Interview Facility page from the Interview Schedule page if they want to review this information. |

Attachments

Upload any useful attachments such as maps or room-specific instructions. The attachments grid includes a link to the document along with information about who uploaded the file and when it was uploaded.

Attachments do not appear on the Interview Schedule page. However, users can access the Interview Facility page from the Interview Schedule page if they want to review this information.

Scheduling Interviews

This section provides overviews of applicant interviews and calendar integration discusses how to:

- Schedule applicant interviews.
- Check participant availability.
- Set notification options for interview changes.
- Modify interview notification text.
- Review and print an interview summary.

Understanding Applicant Interviews

Use the Interview Schedule page to schedule interviews at any time in the recruiting process, whether or not the applicant is associated with a job opening. The Interview Schedule page always shows data for a single job opening (or for no job opening, if applicants have applied without selecting a job opening); it can show interview information for one or more applicants.

Navigation and the Manage Interviews Action

To access the Interview Schedule page, use the *Manage Interviews* action.

See [Chapter 19, "Managing Applicants," Actions in the Take Action Field, page 559.](#)

The *Manage Interviews* action is available in these locations:

- Find Applicants page: Search Results grid (individual action or group action).
To schedule interviews using a group action, all selected rows in the search results must be for the same job or must all have no job opening selected.
- Manage Applicant page: Applicant Activity grid (individual action).
This grid shows the jobs that an applicant is linked to, so performing the action brings you to the Interview Schedule page for a single applicant and a single job opening.
- Job Opening page: Manage Applicants grid (individual action or group action).

You can also access the Interview Schedule page these ways:

- On the Disposition Details - Interview page, click the Manage Interviews link.
- On the Job Opening page, click the Interview Schedule link under the Manage Applicants tab.
- On the Manage Applicant page, access interview summary information by clicking the Interview Schedule/Evaluation link under the Applicant Activity tab, then click the Manage Interviews link or click the date of an already-scheduled interview.

When you click the Manage Interviews link, the system prompts you to select the job opening for which you are scheduling an interview.

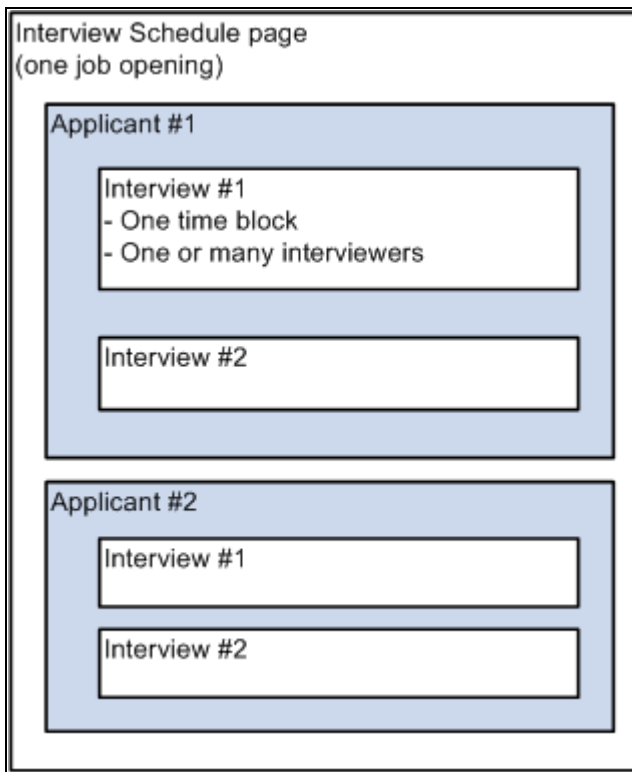
Schedules for Multiple Applicants

The Interview Schedule page always shows interviews for a single job opening, but depending on how you access the Interview Schedule page, it can show schedules for one applicant or multiple applicants. The page includes a collapsible section for each included applicant, even if there is only one.

Recruiters can view only those interview schedules that they created. Administrators can see all interview schedules.

Within the section for a single applicant, there are collapsible sections for each scheduled interview. In this context, a single interview refers to a single block of time that is associated with one or more interviewers. To schedule separate time slots for different interviewers, recruiters need to set up multiple interviews.

This diagram illustrates the data hierarchy on the Interview Schedule page, where one job opening can have one or more applicants, and each applicant can have one or more interviews.



Interview Schedule page layout

Links at the bottom of the page enable you to expand or collapse all sections with a single click.

Interview Information

When you schedule an interview, you provide the following information:

- General interview information such as the status, the interview type, and the person who entered the interview information.
- The date and the overall start and end time for the interview.
- A list of interviewers, including the schedule within the overall time block.
- Location information, including both an overall location (such as a particular office building) and specific venues (such as conference rooms) in that location.

Applicant Letters

When you enter interview information, you can choose a template to use to send the applicant a letter with the interview information.

When you submit the interview schedule, the letter is added to the next run of the HRS Letter Generation process (HRSLETTER), which generates all queued letters as a batch process. When the system generates the letter, it also creates a contact note for the applicant.

As an alternative to letting the batch process produce the letter, you can instead generate the letter from the Interview Schedule page, which removes it from the queue for the HRS Letter Generation process.

To generate a letter from the interview schedule, use these links:

- **Generate Letter**

Click this link to generate an interview letter based on the selected template. The letter opens in a new browser window where you can review and optionally update it. If you make changes, save the modified letter to your local disk so that you can upload the revised version.

When you generate the letter, the system enters the current date in the Date Printed field, generates a contact note for the applicant, and removes the letter from the Generate Recruitment Letters (HRSLETTER) process queue.

- **Email Applicant**

Click this link to access the Send Correspondence page. If you manually generated an interview letter using the Generate Letter link, then the Send Correspondence page includes the interview letter as a default attachment to the email. When you send the correspondence, the system generates a contact note for the applicant; the contact note includes any attachments that were in the email.

- **Upload Letter**

Click this link to upload a letter file from a local disk. Typically, you are uploading a modified copy of the letter that you created by clicking the Generate Letter link.

When you upload a letter, the system creates a contact note for the applicant. The contact note includes the interview letter attachment.

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

Interview Information in Candidate Gateway

When you schedule an interview for an applicant who uses Candidate Gateway (an internal applicant or a registered external applicant), an interview notification appears in the applicant's Candidate Gateway home page. The applicant can click the notification to view interview details.

See Also

PeopleSoft Enterprise Candidate Gateway 9.1 PeopleBook, "Using Candidate Gateway," Viewing Interview Schedules

[Chapter 19, "Managing Applicants," Sending Correspondence and Recruitment Letters, page 591](#)

Understanding Calendar Integration for Interviews

This section provides an overview of calendar integration for interviews.

Integration Setup

To activate calendar integration for interviews in Talent Acquisition Manager, use the Recruiting Installation – General page, where you select the level of calendar integration for your system:

- *Full* integration uses Desktop Integration functionality to integrate with Microsoft Outlook 2007.

PeopleSoft Enterprise Desktop Integration provides integration between Talent Acquisition Manager and Microsoft Office. The integration enables you to pass interview data to Microsoft Outlook and receive updated information when changes are made in Microsoft Outlook. Oracle delivers the framework for this integration as part of the PeopleSoft Enterprise Components that are bundled with every PeopleSoft application.

A PeopleSoft plug-in for Microsoft Outlook (required for recruiters who schedule interviews) enables Microsoft Outlook to maintain a link between the invitation and the original Talent Acquisition Manager transaction.

- *Partial* integration sends interview schedules to applicants as an iCalendar attachment.

The iCalendar file contains only the information that is required for creating a meeting request in an external calendar. The participant can import the iCalendar meeting request and act on it. This is a one-way integration and TAM does not get any response back from the participant.

- *None* indicates that you do not want to integrate with external calendaring systems.

See [Chapter 2, "Defining Installation Options for Recruiting," Defining General Settings for Templates, Approvals, and Integrations, page 11.](#)

Full Calendar Integration

When you enable full calendar integration with Microsoft Outlook, recruiters still create the interview schedule using the PeopleSoft system. When the recruiter submits the interview data, the system sends the information to Microsoft Outlook via the Desktop Integration queue. The recruiter or meeting organizer can then send the meeting invitation from Microsoft Outlook.

The Microsoft Outlook meeting owner is the user who originated the interview in the PeopleSoft system. The users who schedule interviews must have the PeopleSoft plug-in for Microsoft Outlook properly installed. People who receive the meeting invitations but do not schedule them do not need the plug-in; to them, the invitation is identical to a standard Microsoft Outlook meeting invitation.

Until the invitations are sent from Microsoft Outlook, users can still make updates to the interview schedule in Talent Acquisition Manager. But after the invitations are sent from Microsoft Outlook, changes to the interview date and time must originate in Microsoft Outlook, not in Talent Acquisition Manager, which makes the relevant fields read-only. A link on the Interview Schedule page enables recruiters to open the meeting in Microsoft Outlook; any changes or cancellations made there are sent back to the PeopleSoft system and reflected on the Interview Schedule page.

Although recruiters cannot modify the interview schedule in the PeopleSoft system after the invitations have been sent from Microsoft Outlook, they can cancel the interview from the Interview Schedule page. The cancellation is sent to Microsoft Outlook, which deletes the corresponding meeting invitation.

The information that the system sends to Microsoft Outlook includes email addresses (not names or aliases) for all participants, including interviewers, venues (which correspond to *resources* in Microsoft Outlook), and applicants. These participants must have valid email addresses in their personal data records.

Internal participants, including internal applicants, receive Microsoft Outlook invitations.

External applicants are not included in the original meeting invitation, but after all internal participants have accepted the invitation, the PeopleSoft system sends an email with an iCalendar attachment to the external applicant. The system also creates an applicant contact note for the email.

As Microsoft Outlook receives replies to the meeting invitation, it sends the information to the PeopleSoft system, which updates the Interview Schedule page to show the attendees' responses. When all participants have accepted the invitation, the Interview Status changes to *Confirmed*.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Integration Interfaces*

Partial Calendar Integration

Under partial calendar integration, interviewers and applicants (both internal and external) receive a formatted iCalendar attachment when the interview is scheduled. Another iCalendar attachment is sent if an interview is cancelled; recipients can open the iCalendar attachment in their calendaring software to remove the meeting request entry from their calendar.

The system also sends an email notification to the applicant when an interview status is set to *Confirmed*.

Interview-Related Notifications

In addition to the Microsoft Outlook meeting invitations that are sent under full calendar integration and the iCalendar attachments that are sent under partial calendar integration, the system can send standard PeopleSoft email notifications to interview participants. You control these notifications through check boxes on the Interview Schedule page. There are separate check boxes for sending notifications to interviewers and applicants.

The notification options depend on your calendar integration:

| Calendar Integration Option | Notify Applicant | Notify Interview Team |
|------------------------------------|---|--|
| Partial | Select to send the applicant both a notification with an iCalendar attachment and a regular notification. | Select to send a regular email notification. |
| Full | Select to send a notification to Candidate Gateway; no email notification is sent. | Not available; interviewers receive Microsoft Outlook meeting invitations. |

You can modify the default notification text for these notifications. You can modify the interviewer and applicant messages separately. Alternatively, you can modify a general notification that is then used for both interviewers

This table lists the interview notifications that the system uses:

| Recipient | Conditions | Notification |
|------------------|--|---------------------------|
| Interviewer | The interview is submitted and the applicant is linked to job opening. | HRS_INTVW_SCHED_TEAM |
| Interviewer | The interview is submitted and the applicant is not linked to job opening. | HRS_INTVW_SCHED_TEAM_NOJO |
| Applicant | The interview is submitted and the applicant is linked to job opening. | HRS_INTVWSCHED_APPL |

| Recipient | Conditions | Notification |
|------------------|--|--------------------------|
| Applicant | The interview is submitted and the applicant is not linked to job opening. | HRS_INTVWSCHED_APPL_NOJO |

Under partial calendar integration and no calendar integration, selecting the notification check boxes also causes the system to send notifications for cancelled interviews. The system sends these notifications to both applicants and interviewers.

Under full calendar integration, the system does not send cancellation notifications.

This table lists the cancellation notifications that the system uses:



| Recipient | Conditions | Notification |
|------------------|--|---------------------------------|
| Interviewer | The interview is cancelled and the applicant is linked to job opening. | HRS_INTVWSCHED_TEAM_CANCEL |
| Interviewer | The interview is cancelled and the applicant is not linked to job opening. | HRS_INTVWSCHED_TEAM_NOJO_CANCEL |
| Applicant | The interview is cancelled and the applicant is linked to job opening. | HRS_INTVW_APP_CANCEL |
| Applicant | The interview is cancelled and the applicant is not linked to job opening. | HRS_INTVW_CANCEL_APP_NOJO |

Note. When the system sends interview notifications to an applicant, it also creates contact notes in the applicant's record.

When a participant's appointment status changes, the system sends a notification to the user who created the interview.

Pages Used to Schedule Applicant Interviews

| Page Name | Definition Name | Navigation | Usage |
|----------------------------------|------------------------|---|--|
| Select Job Opening for Interview | HRS_APP_ACTION | Recruiting, Find Applicants, Find Applicants Search for applicants, then click an applicant name to access the Manage Applicant page. On the Manage Applicant page, click the Interview Schedule/Evaluation link under the Applicant Activity tab, then click the Manage Interviews link. | Select the job opening for which you are scheduling an interview for an applicant. |

| Page Name | Definition Name | Navigation | Usage |
|--|--|--|---|
| Interview Schedule | HRS_INT_SCHED | <p>You can access the Interview Schedule page several ways. This list presents the most frequently used methods.</p> <ul style="list-style-type: none"> • Select <i>Manage Interviews</i> in the Take Action field in the Search Results grid on the Find Applicants page or in the Applicant Activity grid on the Manage Applicant page, or in the Take Action field in the Manage Applicant grid on the Job Opening page. • Click the Continue button on the select Job Opening for Interview page | Schedule applicant interviews. |
| Comments | HRS_RCRTR_CMTS_SP HRS_REC_APP_CMT_SP |  Click the Comments icon on the Interview Schedule page. There are separate Comments icons for applicant-specific comments, for interviewer-specific comments, and for venue-specific comments. | Add a comment that can be viewed by the interview team on the Interview Schedule page. |
| Interview Schedule - Applicant Availability Interview Schedule - Interviewer Availability Venue Availability | HRS_APP_AVAIL_SP HRS_INT_AVAIL_SP HRS_VEN_AVAIL_SP |  On the Interview Schedule page, click the Availability icon for the applicant, for a specific interviewer, or for the venue. | View the current interview schedule for an applicant, interviewer, or venue. |
| Interview Data Change | HRS_INTWR_CHNG_SP | Click the Add Interviewer link on the Interview Schedule page. | Choose notification options after making a change to the list of interviewers for an interview. Note. This page is not available if the system is configured for full calendar integration. |

| Page Name | Definition Name | Navigation | Usage |
|------------------|------------------------|---|---|
| Interview Note | HRS_INT_NOTE_PG | <ul style="list-style-type: none"> Click the Add Note link on the Schedule Interview page. Click the View Notes link for an existing note on the Schedule Interview page. | <p>Maintain interview-related notes. This page functions similarly to the other note-related pages in the system.</p> <p>See Chapter 17, "Managing Job Openings," Adding Notes to Job Openings, page 533.</p> |
| Interview List | HRS_VW_ALL_INT_PG | Click the View/Print All Interviews link on the Interview Schedule Page. | View a read-only summary of data from the Schedule Interview page, and print the information in this compact format. |


Scheduling Applicant Interviews

Access the Interview Schedule page (on the Find Applicants page, select *Manage Interviews* from the Take Action field).

Job Opening

Interview Schedule

Listed below are the interview schedules for the applicant(s) selected. Create a new interview schedule or update an existing schedule. Choose the Delete icon to remove corresponding interviewers. Use the Add Interviewer hyperlink to add interviewers not defined within the Job Opening.

 [Print Job Opening](#)

| | | | |
|----------------------------|------------------------------------|------------------------|----------|
| Posting Title: | HRIS Specialist | Job Opening ID: | 30017 |
| Job Opening Status: | 010 Open | Job Type: | Standard |
| Job Title: | Specialist-HRIS | Job Code: | 820065 |
| Position Number: | 19000012 HRIS Specialist | | |
| Business Unit: | GBIBU Global Business Institute BU | | |
| Job Family: | KHR Human Resources | | |

[Return to Previous Page](#)

▼ Bob Montana

| | | | |
|------------------------|--------------------|---------------------------|-------|
| Applicant Name: | Bob Montana | Applicant ID: | 1027 |
| Applicant Type: | External Applicant | Preferred Contact: | Email |

▶ Interview 1 - Date : 2004-09-21 from 10:00 AM to 11:00 AM

▶ Interview 2 - Date : 2004-10-03 from 10:00 AM to 11:00 AM

[Launch Scheduler](#)

Interview Schedule page (1 of 4)

▼ Stewart Johannsen

Applicant Name: Stewart Johannsen Applicant ID: 1031
 Applicant Type: External Applicant Preferred Contact: Not Specified

▼ Interview 1 - Date : 2004-10-03 from 11:00 AM to 12:00 PM

Interview Status: Scheduler Status:
 Interview Type: Initiator: Betty Locherty

Applicant Appointment Status: Notify Applicant

Interview Details

Date: Time Zone: Start Time: End Time:

▼ Interview Schedule Customize | Find | First 1-2 of 2 Last

| Interviewer ID | Interviewer Name | Date | Start Time | End Time | Time Zone | Appointment Status | Comments | Availability |
|-------------------------------------|------------------|------------|------------|----------|-----------|-----------------------------------|----------|--------------|
| <input type="text" value="KU0011"/> | Patrick Seto | 10/03/2004 | 11:00AM | 12:00PM | PST | <input type="text" value="None"/> | | |
| <input type="text" value="KU0105"/> | Vicky Adler | 10/03/2004 | 11:00AM | 12:00PM | PST | <input type="text" value="None"/> | | |

[+ Add Interviewer](#) Notify Interview Team

Interview Schedule page (2 of 4)

Venue Information Customize | Find | View All | First 1 of 1 Last

| Venue | Email | Appointment Status | Comments | Availability |
|--|-----------------------|-----------------------------------|----------|--------------|
| <input type="text" value="Meeting Room 2a"/> | meetroom2a@system.com | <input type="text" value="None"/> | | |

[Add/Maintain Venue Information](#)

Location

Level 42
 Wilsreck Building
 5 Gotarph Street
 Abbeville

Interview Schedule page (3 of 4)

Preview/Edit Meeting Request

[General Meeting Request](#) [Interviewer Meeting Request](#) [Applicant Meeting Request](#)

Letter

Letter: Date Printed:

[Generate Letter](#) [Email Applicant](#) [Upload Letter](#)

Attachment

No Attachment have been added to this Interview.

[+ Add Attachment](#)

Notes

No notes have been added to this Interview.

[+ Add Note](#)

[Launch Scheduler](#)

[Return to Previous Page](#)

[View/Print All Interviews](#) [Expand All](#) [Collapse All](#)

Interview Schedule page (4 of 4)

Page-Level Action Buttons

Print Job Opening Click to access the Select Job Openings page, where you configure and generate a printed version of the job opening data.
 See [Chapter 17, "Managing Job Openings," Printing Job Openings, page 535.](#)

Submit Click when you have finished entering the information for scheduling interviews. The system updates the applicant's disposition to *Interview*.
 If calendar integration is active, submitting the interview schedule triggers the integration, and the system creates the Microsoft Outlook meeting (for full calendar integration) or iCalendar attachments (for partial calendar integration).

Save for Later Click to save your changes without generating notifications, updating the applicant's disposition, or creating calendar meetings.

Note. Under full calendar integration, the interview is queued for Outlook only when submitted. Clicking the Save for Later button does not queue the interview.

Cancel and Return to Previous Page Click either of these to return to the previous page without saving any changes.

<Applicant Information>

The system displays a collapsible section for each applicant for whom you are scheduling interviews. The applicant's name appears in the section heading.

Applicant Name, Applicant ID, Applicant Type, and Preferred Contact These fields display identifying information about the applicant. The applicant types are *Employee*, *External Applicant*, and *Non-Employee*.

Interview-Level Page Elements

For each applicant included on the page, the system displays one or more collapsible sections representing separate interview times. (These interview times can be subdivided for multiple interviewers; there is no need to create separate interviews as long as all interviews occur within the same overall block of time).

The header information for each interview includes these fields:

Interview Status

Note. This field appears only when calendar integration (full or partial) is active.

Users can always update the interview status manually. Additionally, under full calendar integration, the system updates the status in certain situations.

These are the possible statuses:

- *Unconfirmed* is the initial status for new and reinstated interviews.

The Recruiter Alerts pagelet in PeopleSoft Enterprise HRMS Portal Pack includes an alert showing how many unconfirmed interviews the user is associated with.

See *PeopleSoft Enterprise HRMS Portal Pack 9.1 PeopleBook*, "Using HRMS Portal Pack Pagelets," Viewing Recruiter Alerts for Talent Acquisition Manager.

- *Scheduled* indicates that the meeting invitation has been sent.

Under full calendar integration, the system sets this status when the interview is scheduled in Microsoft Outlook.

- *Confirmed* indicates that all participants have accepted the invitation.

Under full calendar integration, the system sets this status after all the participants have accepted the Microsoft Outlook meeting; if a recruiter manually sets the status to *Confirmed*, the system checks if all participants have accepted the Microsoft Outlook invitation and displays a warning if any participants have not accepted the invitation.

- *Completed* indicates that the interview has occurred and all interview evaluations are done.

The Interview Evaluation Reminder (HRS_INT_EVAL) Application Engine process changes the interview status to *Completed* when it processes interviews after their scheduled date. Users can also manually put interviews in *Completed* status.

See [Chapter 14, "Interviewing Applicants," Finalizing Interviews and Sending Evaluation Reminders, page 457.](#)

- *Cancelled* indicates that the interview was cancelled; all interview data for a cancelled interview is read-only.

Users can update the status directly (though the change does not take effect until the changes are submitted), or they can click the Cancel button that appears at the end of each interview section.

Scheduler Status

Note. This field appears only when full calendar integration is active.

Displays the interview's status with regard to creating a Microsoft Outlook calendar invitation. The available statuses are:

- *Initial - Not Visible:* This is the default status when you set up an interview. It indicates that the interview data has not yet been sent to PeopleSoft Enterprise Desktop Integration for scheduling.
- *On Hold - Do Not Schedule:* Select this status if you do not want the system to create a Microsoft Outlook meeting.
- *Queued for Scheduling:* Select this status if you want the system to queue the submitted interview for scheduling in Outlook.

Interview Type

Select one of the interview types that your organization defined on the Interview Types page. The specific values depend on how your organization chooses to classify interviews.

See [Chapter 6, "Setting Up Additional Recruiting Definitions," Creating Interview Types, page 102.](#)

Initiator

Displays the name of the user who originally created the interview information.

Applicant Appointment Status

Under partial or no calendar integration, users manually set the appointment status to *Accepted*, *Declined*, *None*(no response), or *Tentative* (tentatively accepted).

Under full calendar integration, the system sets the appointment status based on the applicant's reply to the Microsoft Outlook meeting invitation. Because only internal applicants are included in Microsoft Outlook meeting invitations, recruiters must update this field manually for external applicants, who do not receive meeting invitations.

**Applicant Comments**

Click to access the Comments page where you can enter applicant-specific comments. These comments appear on the interview details that the applicant views in Candidate Gateway.

**Applicant Availability**

Click to access the Interview Schedule - Applicant Availability page, which displays all interview dates and times for the applicant.

This page does *not* display information from the applicant's Microsoft Outlook calendar; it displays only interview data from the PeopleSoft system.

Notify Applicant

Select this check box to have an email notification sent to the applicant when the interview is submitted.

By default, this check box is initially deselected. Under full calendar integration, the system selects the check box when the interview status changes to *Confirmed*, thus sending the applicant a notification email at that time.

Interview Details

| | |
|---|--|
| Date | Enter the date on which the interview is to take place. |
| Time Zone, Start Time and End Time | Enter the start and end times for the applicant's interview. This time applies to all interviewers. To schedule different interviewers at different times, you must create multiple interviews for the applicant. The default time zone is the recruiter's own time zone. |

Interview Schedule

Use the Interview Schedule grid to schedule specific interviewers during the overall interview time block.

| | |
|--|---|
| Interviewer ID and Interviewer Name | Identify interviewers by entering their employee IDs; the system then displays the interviewers' name. |
| Date, Start Time and End Time | Displays the date and time for the interview in the interviewer's own time zone. Every interviewer is scheduled for the entire block of time. To schedule different times for different interviewers, create additional interviews. |

Appointment Status (interviewer appointment status) If you use full calendar integration, and if the initiator receives a Microsoft Outlook calendar response to the invitation, the system updates the interviewer's appointment status accordingly. Otherwise, manually set the appointment status to *Accepted*, *Declined*, *None* (no response), or *Tentative* (tentatively accepted).



Click the Comments icon to access the Comments page and enter interviewer-specific comments.



Click the Availability icon to access the Interview Schedule - Interviewer Availability page, where you can view the interviewer's current interview schedule.

This page does *not* display information from the interviewer's Microsoft Outlook calendar; it displays only interview data from the PeopleSoft system.



Delete

Click the Delete icon to remove a particular interviewer from the interview schedule.

Add Interviewer

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

If you are not using full calendar integration, clicking this link displays the Interview Data Change page, where you choose which participants, if any, to send notifications related to the addition of the new interviewer.

Notifications are not necessary under full calendar integration, which automatically includes the additional interviewer in the Microsoft Outlook meeting invitation for the interview. (If the Microsoft Outlook meeting invitation has already been sent, you must use Microsoft Outlook rather than Talent Acquisition Manager to add additional interviewers; Microsoft Outlook then sends information about the new interviewer to the PeopleSoft system so it can add the interviewer to the schedule.)

Notify Interview Team Select this check box to have an email notification sent to the interviewers listed in the Interview Schedule grid. The system uses the email addresses from the interviewers' Personal Data records (not the email addresses from their User ID security profiles).

Venue Information and Location

Venue and Add/Maintain Venue Information In the Venue field, select a physical location for the interview. Under full calendar integration, venues correspond to Microsoft Outlook resources. The available values are those that you set up in the Interview Facilities page. To modify venue details, or to add a new venue, click the Add/Maintain Venue Information link to access the Interview Facilities page.

Email When you select a venue, its email appears in the grid. This is relevant only if you use full calendar integration, in which case the ability to book the venue using Microsoft Outlook depends on the venue email matching the corresponding resource email in Microsoft Outlook.

Appointment Status (venue appointment status) If you use full calendar integration, and if the initiator receives a Microsoft Outlook calendar response to the invitation, the system updates the venue appointment status accordingly. Otherwise, users manually set the appointment status to *Accepted*, *Declined*, *None*(no response), and *Tentative* (tentatively accepted).

Location If there is location information in the venue definition, the system enters that location information here, replacing any existing location text. You can modify the location text, and any changes that you make are saved to the venue definition.

Preview/Edit Meeting Request

Use the links in this section to access the Interview Request page, where you can personalize the text of the meeting invitation for this interview.

Note. This section appears only under partial calendar integration.

General Meeting Request Click to modify the text used in the meeting invitation that is sent to all participants (interviewers and internal applicants). Clicking this link causes the system to use one general meeting request for both interviewers and applicants; therefore, clicking this link disables the Interview Meeting Request and Applicant Meeting Request links.

Interview Meeting Request and Applicant Meeting Request

Click to modify the text used to notify interviewers and applicants of the interview. Clicking either one of these links causes the system to use separate meeting requests for interviewers and applicants; therefore, clicking either link disables the General Meeting Request link.

Note. Under full calendar integration, only internal applicants receive meeting requests; therefore, the Applicant Meeting Request link is only available for internal applicants.

Letter

Letter

Select a letter that you want to send to the applicant when an interview is scheduled. Talent Acquisition Manager delivers these templates:

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

Date Printed

Displays the date that you printed the letter. The system populates the field when you click the Generate Letter link or when the letter is generated by the Generate Recruitment Letter Application Engine (HRSLETER) process.

Generate Letter

Click this link to generate the letter immediately. The system opens the generated letter in a new browser window, where you can print it or save it locally. Once the letter is generated, the Generate Letter link is no longer available and the letter is removed from the Generate Recruitment Letters (HRSLETTR) process.

When you generate a letter, the system creates a contact note entry on the Manage Applicant page: Contact Notes tab. The letter is an attachment to the note. If you subsequently click the Email Applicant link, the system automatically attaches the generated letter to the email.

Email Applicant

Click this link to display the Send Correspondence page, where you can send the applicant email. If you have generated or uploaded a letter, the Attachments grid on the Send Correspondence page includes the letter (although you can remove or replace it if you wish).

After accessing the Send Correspondence page, enter the email subject and message, then send it to the applicant. When you send the email, the system creates a contact note on the Manage Applicant page: Contact Notes tab. The email attachments are saved as note attachments.

See [Chapter 19, "Managing Applicants," Sending Correspondence and Recruitment Letters, page 591.](#)

Upload Letter

Click this link to upload a saved letter as an attachment. Most commonly, you use this link to upload a modified version of the original generated letter. However, it is not necessary to generate a letter before uploading one.

When you upload a letter, the system creates a contact note entry on the Manage Applicant page: Contact Notes tab. The letter is an attachment to the note.

If you subsequently click the Email Applicant link, the system automatically attaches the modified letter (rather than the original) to the email.

Attachments and Notes**Attachments**

Use the Attachments grid to attach external documents, such as interview scripts, to the interview schedule.

Click the Add Attachment link to add file attachments to the grid; the system prompts you to identify the file to be uploaded.

When a file is uploaded, the default description is the file name. You can modify this description until you save or submit the interview, at which point it becomes read-only.

To view an existing attachment, click its file name. The attachment opens in a new browser window.

Notes

Use the Notes grid to add notes related to the interview. You can also add attachments to individual notes.

These notes are specific to the interview; they are not associated directly to either the job opening or the applicant.

Buttons for Cancelling and Reinstating Interviews**Cancel Interview and Reinstatement Interview**

Click the Cancel Interview button, which appears only after an interview has been saved and submitted, to cancel the interview. You must then submit or save the interview to complete the cancellation. When the interview is cancelled, the system changes the Interview Status to *Cancelled*, and all fields for the cancelled interview become read-only.

Under full calendar integration, cancelling an interview also cancels the Microsoft Outlook meeting invitation.

If you cancel an interview and the Notify Interview Team or Notify Applicant check boxes are selected, the system sends notifications to the appropriate recipients.

You cannot cancel interviews that have attached evaluations or where the applicant has proceeded past the *Interview* disposition.

Reinstate Interview After an interview is cancelled, the Reinstate Interview button replaces the Cancel Interview button. Click the Reinstate Interview button to change the interview status to *Unconfirmed* and make the interview fields editable again. You must change the interview date before submitting it.

Under full calendar integration, reinstating an interview creates a new Microsoft Outlook meeting invitation.

Applicant-Level Actions

These page elements appear at the end of each applicant section.

Add Interview Click this button, which appears once per applicant (at the bottom of the Schedule Interview page) to add an additional interview section for the applicant. It is not necessary to create separate interview sections for each interviewer.

Launch Scheduler

Note. This link appears only under full calendar integration.


Click this link to open Microsoft Outlook so that you can review and update interview meeting invitations.

Recruiters who schedule interviews and therefore originate the Microsoft Outlook meeting invitations must have the PeopleSoft plug-in for Microsoft Outlook installed. The plug-in adds PeopleSoft-specific features to Microsoft Outlook, including the ability to send meeting changes back to Talent Acquisition Manager.

Checking Participant Availability

Access the Interview Schedule page (click the applicant availability or interviewer availability icon on the Interview Schedule page) or the Venue Availability page (click the venue availability icon on the Interview Schedule page).

Interview Schedule

Interview Date: 

Interviewer: Betty Locherty

| Interviewer Availability | | | | |
|--------------------------|------------|----------|-------------------|---|
| Time Zone | Start Time | End Time | Applicant Name | Location |
| PST | 11:00AM | 12:00PM | Stewart Johannsen | Level 42 Wilsreck Building 5 Gotarph Street Abouleville New York |
| PST | 2:00PM | 3:00PM | Bob Montana | Room 1, Ground Floor, Global Business Centre, 548 Sydweigh Boulevard San Francisco |

Interview Schedule page

Setting Notifications Options for Interview Changes

Access the Interview Data Change page (click the Add Interviewer link on the Interview Schedule page).

Interview Data Change page

Note. This page appears only in systems that do not use full calendar integration.

Interview Data Change Choose which interview participants, if any, to notify of the change to the interview schedule. The default option is to notify only the newly added interviewer. Other options enable you to select all participants, only interviewers, or only the applicant. You can also choose not to send any notification.

Preview / Edit Meeting Request This section appears only under partial calendar integration. Use the links to preview the text of the notification and make any necessary modifications.

The Applicant Meeting Request link is available only for internal applicants.

Modifying Interview Notification Text

Access the Interview Request page (click the General Meeting Request, Interviewer Meeting Request, or Applicant Meeting Request link on the Interview Schedule page).

Schedule Interview

Interview Request

Save
Cancel
[Return to Previous Page](#)

Message Type and Method

Contact Method: Email
Meeting Request Type: Interviewer Meeting Request

Recipient Information

To: HCMGENUser1@ap6023fems.us.oracle.com,
 HCMGENUser1@ap6023fems.us.oracle.com

Sender Information

From: Betty Locherty

Message

Subject: Interview Schedule for Bob Montana on 2009-06-02

Message:

You are scheduled to interview 1027 Bob Montana on 2009-06-02 from 2:00 PM to 3:00 PM for Job Opening 30017 for HRIS Specialist. You should have already been contacted about this interview by the hiring manager or recruiter. This message is just to confirm the scheduled interview.

The location entered into Online Recruiting for this interview is Room 1, Ground Floor, Global Business Centre, 548 Sydweigh Boulevard

Access: Public

Attachment

No Attachment have been added to this Message Request.

+ Add Attachment

Interview Request page

Subject and Message Review the subject and text of the message and make any necessary modifications.

Access The system saves the message as a contact note for the applicant; choose whether the note is to be *Public* (the default) or *Private*. Anyone can view a public contact note; only the creator of the note can view a private note.

Add Attachment You can optionally add attachments to the message. For example, you could attach a map to the interview venue.

Reviewing and Printing an Interview Summary

Access the Interview List page (click the View/Print All Interviews link on the Interview Schedule page).

Schedule Interview

Interview List

[Print this Page](#)

Interview list for

Applicant Name: Martha Lewis

Interview Details

Job Opening: 30017 HRIS Specialist

Description: 050 Route

Interview 1

Interview Schedule

| Name | Status | Interview Level | Time Zone | Date | Start Time | End Time |
|--------------|-----------|-----------------|-----------|------------|------------|----------|
| Patrick Seto | Unconfirm | Inhouse1 | EST | 06/02/2009 | 10:00AM | 10:30AM |

Job Opening: 30017 HRIS Specialist

Description: 050 Route

Interview 2

Interview Schedule

| Name | Status | Interview Level | Time Zone | Date | Start Time | End Time |
|-------------|-----------|-----------------|-----------|------------|------------|----------|
| Vicky Adler | Unconfirm | | EST | 06/02/2009 | 10:30AM | 11:00AM |

[Return to Previous Page](#)

Interview List page

This page summarizes the data on the Interview Schedule page in a simple printer-friendly format. The page lists all the interviews for one or more applicants for a single job.

Click the Print this Page link to print the interview list exactly as it appears on screen.

Completing Interview Evaluations

This section provides an overview of interview evaluations, lists prerequisites, and discusses how to:

- Complete an interview evaluation.

- Update a submitted evaluation.

Note. Only the scheduled interviewers (as entered on the Interview Schedule page) can create evaluations. Only administrators can update submitted evaluations.

Understanding Interview Evaluations

To complete an interview evaluation, you use the Interview Evaluation (HRS_INT_EVAL) component.

Creating Evaluations

To create a new interview evaluation, use the *Create Interview Evaluation* action, which displays the Interview Evaluation page and is available from these locations:

- The search results grid on the Find Applicants page (individual action).
- The Manage Applicants grid on the Job Opening page (individual action or group action).

When you use a group action, the Interview Evaluation page includes collapsible sections for each included applicant.

- The Applicant Activity grid on the Manage Applicant page (individual action).

You can also create an interview evaluation from the Interview Evaluations grid that appears on the Disposition Details - Interview page and on the Manage Applicant page: Applicant Activity tab: Interview Schedule/Evaluations section.

Completing Evaluations

The evaluation categories that appear on the Interview Evaluation page come from the interview evaluation template that is associated with the job opening's recruitment template.

Evaluators assign ratings to the individual categories, give an overall rating and recommendation, and enter any comments.

There are two options for saving an evaluation:

- The Save button saves data without submitting the evaluation; the evaluator can continue to work on the evaluation later.
- The Submit Evaluation button saves and submits the data and returns the user to the previous page; the evaluator cannot make any further changes unless an administrator reverses the submission using Send Back functionality.

Reviewing Evaluation Progress and Accessing Existing Evaluations

To view a list of interview evaluations for an application, use the Interview Evaluations grid. This grid appears in two places:

- On the Disposition Details - Interview page that appears when you click the disposition *Interview* on the same three pages where you perform the *Create Interview Evaluation* action.

- On the Manage Applicant page, under the Applicant Activity tab, in the Interview Schedule/Evaluation section.

The Interview Evaluations grid lists all scheduled interviewers and, for submitted evaluations, the overall rating and recommendation. The grid also includes an Action column with links that the user clicks to access the Interview Evaluation page. The link text indicates whether the link is used to create a new evaluation, complete an already-started evaluation, or view a completed evaluation.

Updating Submitted Applications

When you set up your recruiting system, you can give administrators the ability to edit, delete, and send back submitted interview evaluations. To do this, select *Yes* in the Administrator Evaluation Edit field on the Recruiting Installation - Applicants page.

See [Chapter 2, "Defining Installation Options for Recruiting," Defining Applicant-Related Settings, page 17.](#)

When you grant administrators these additional privileges, administrators see an *Edit Evaluation* link rather than a *View Evaluation* link next to completed evaluations. Clicking this link displays the Interview Evaluation page, but in this mode, the Save and Submit Evaluation buttons are replaced by buttons that the administrator can use to:

- Edit the completed evaluation.
When an administrator edits an evaluation, additional fields show who edited the evaluation and when it was edited. The administrator can also enter comments regarding the changes.
- Delete the completed evaluation.
- Send back the evaluation, an action that reverses the evaluation submission as if the original evaluator had saved it without submitting it.

Prerequisites

Before you can interview applicants, you must set up the interview evaluation template.

See [Chapter 7, "Setting Up Recruiting Templates," Setting Up Interview Evaluation Templates, page 144.](#)

Before administrators can update submitted evaluations, you must select *Yes* in the Administrator Evaluation Edit field on the Recruiting Installation - Applicants page.

See [Chapter 2, "Defining Installation Options for Recruiting," Defining Applicant-Related Settings, page 17.](#)

Pages Used to Complete Interview Evaluations

| Page Name | Definition Name | Navigation | Usage |
|------------------|------------------------|--|-----------------------------------|
| Find Applicants | HRS_REC_SCHAPP | Recruiting, Find Applicant, Find Applicant | Search for and select applicants. |

| Page Name | Definition Name | Navigation | Usage |
|----------------------------|-----------------------------------|--|---|
| Interview Evaluation | HRS_INT_EVAL HRS_VIEW_INT_EVAL | <ul style="list-style-type: none"> To create a new evaluation, select <i>Create Interview Evaluation</i> in the Take Action or Group Action field on the Find Applicants page, on the Manage Applicant page, or on the Job Opening page. To access an existing evaluation, click the View Evaluation or Update Evaluation link on the Disposition Details - Interview page or in Interview Evaluations grid on the Manage Applicant page: Applicant Activity tab: Interview Schedule/Evaluation section. | Create, update, or review interview evaluations. |
| Interview Evaluations | HRS_INT_EVAL_LST | Self Service, Recruiting Activities, Interview Evaluations, Interview Evaluations | Create, update, or review interview evaluations using self-service. |
| Evaluation Rating Comments | HRS_INT_EVAL_SEC | Click the Comments icon for a rating category on the Interview Evaluation page. | Enter evaluation comments for a specific category. |

Creating an Interview Evaluation

Access the Interview Evaluation page (select *Create Interview Evaluation* in the Take Action or Group Action field on the Find Applicants page, on the Manage Applicant page, or on the Job Opening page).

Manage Applicant: Gregory Wu


Interview Evaluation

Complete the evaluation form by providing an interview rating for each category, an overall rating and a recommendation. Provide any appropriate comments. Choose the Submit Evaluation button when you are done.





[Return to Previous Page](#)

Gregory Wu

| | | | |
|------------------------|-------|------------------------|-----------------|
| Applicant ID: | 1017 | Applicant Name: | Gregory Wu |
| Job Opening ID: | 30017 | Posting Title: | HRIS Specialist |
| Submitted By: | PS | Date Submitted: | 06/02/09 4:28PM |

Interview Date:  **Interview Type:**

Rate Applicant

| Category | Interview Rating | Score | Comments |
|----------------------|--|-------|---|
| Communication Skills | <input type="text" value="Average"/> | 1 |  |
| Education/Training | <input type="text" value="Average"/> | 1 |  |
| Work Experience | <input type="text" value="Not Qualified"/> | 0 |  |
| Technical Skills | <input type="text" value="Not Qualified"/> | 0 |  |

Interview Evaluation page (1 of 2)

The screenshot displays a web form for evaluating an applicant. At the top, there is a section titled "Recommendation" with three dropdown menus: "Overall Rating" set to "Not Qualified", "Recommendation" set to "110 Reject", and "Reason" set to "Insufficient Skills". Below this is a "General Comments" section with a large text area and a small icon of a document with a checkmark. Underneath the comments is a blue bar with a right-pointing arrow and the name "Stewart Johannsen". At the bottom of the form are several buttons: "Save", "Submit Evaluation", "Cancel", and a blue link "Return to Previous Page". Below these buttons are two more buttons: "Expand All" and "Collapse All".

Interview Evaluation page (2 of 2)

Evaluator Actions


- Save** Click this button to save your work without submitting evaluations or navigating away from this page. If the page includes sections for multiple applicants, the system saves all sections except those for which no rankings have been entered.
- Submit Evaluation** Click this button to submit your completed evaluations and return to the previous page. All evaluations on the page must be complete before you can submit them; the system displays error messages if there is any missing data.
- Cancel and Return to Previous Page** Click to return to the previous page without saving or submitting your work.

<Applicant Name>

The page displays an expandable section for each applicant you are evaluating. Several read-only fields at the top of this section give basic information about the applicant and the job opening. Additional fields identify the user who submitted the evaluation and the date that the evaluation was submitted.

- Interview Date and Interview Type** Displays the date and interview type that were entered when the interview was scheduled. You can override the data in these fields if necessary.

Rate Applicant

| | |
|---|---|
| Category | The grid lists the rating categories that are associated with the interview template for the job opening. |
| Interview Rating and Score | Select a rating for the given category. The system displays the score that is associated with the rating you select. Ratings are associated with scores in the interview evaluation template for the job opening. |
|  Comments | Click the Comments icon to access the Evaluation Rating Comments page and enter a comment for the specified category. |

Recommendation and General Comments

| | |
|----------------------------------|--|
| Overall Rating | Enter an overall rating. Select from the values that were defined in the Interview Evaluation Ratings page. See Chapter 6, "Setting Up Additional Recruiting Definitions," Creating Interview Ratings, page 103. |
| Recommendation and Reason | Enter an overall recommendation. Select from the statuses are defined for the Interview recruitment phase. See Chapter 4, "Setting Up Recruiting Statuses," Defining Statuses and Reasons Codes, page 49. If the interview evaluation template is configure to require a reason for the rating you select, the Reason field appears. The available values are the reasons that are associated with the status that you selected as the recommendation. |
| General Comments | Enter freeform text comments about the applicant. |

Updating a Submitted Evaluation

Access the Interview Evaluation page in administrative update mode (click the Edit Evaluation link in the Interview Evaluations grid on the Disposition Details - Interview page).

Manage Applicant: Stewart Johannsen

Interview Evaluation

Complete the evaluation form by providing an interview rating for each category, an overall rating and a recommendation. Provide any appropriate comments. Choose the Submit Evaluation button when you are done.

Edit
Send Back
Delete
[Return to Previous Page](#)

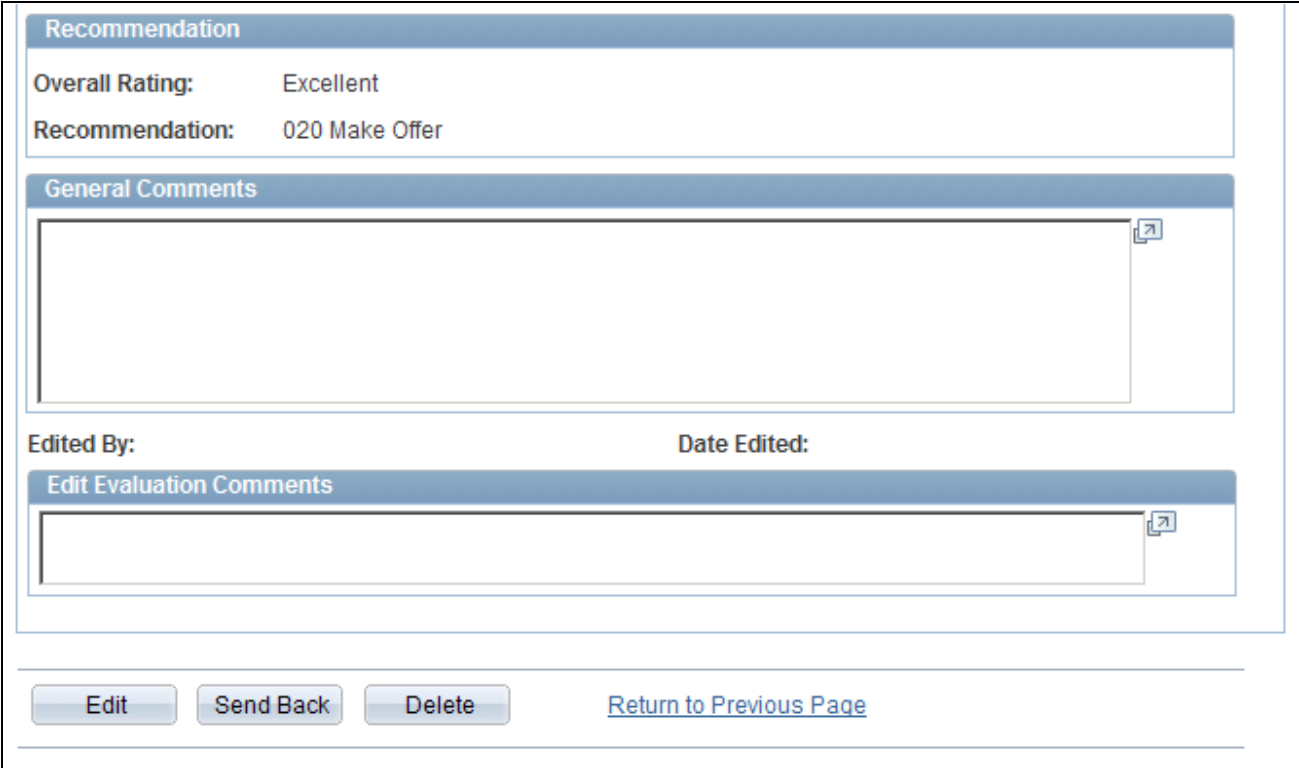
▼ Stewart Johannsen

| | | | |
|------------------------|---------|------------------------|-------------------|
| Applicant ID: | 1031 | Applicant Name: | Stewart Johannsen |
| Job Opening ID: | 30017 | Posting Title: | HRIS Specialist |
| Submitted By: | HCQAN-R | Date Submitted: | 06/02/09 5:17PM |

| | | | |
|------------------------|------------|------------------------|----------|
| Interview Date: | 06/02/2009 | Interview Type: | Inhouse1 |
|------------------------|------------|------------------------|----------|

| Rate Applicant | | | |
|----------------------|------------------|-------|----------|
| Category | Interview Rating | Score | Comments |
| Communication Skills | Excellent | 2 | |
| Education/Training | Excellent | 2 | |
| Work Experience | Average | 1 | |
| Technical Skills | Excellent | 2 | |

Interview Evaluation page in administrative update mode (1 of 2)



The screenshot shows a web interface for editing an interview evaluation. It is divided into several sections:

- Recommendation:** A blue header bar. Below it, the text reads: Overall Rating: Excellent, Recommendation: 020 Make Offer.
- General Comments:** A blue header bar above a large, empty text area with a small icon in the top right corner.
- Edited By:** and **Date Edited:** fields, both currently empty.
- Edit Evaluation Comments:** A blue header bar above another empty text area with a small icon in the top right corner.

At the bottom of the form, there are four buttons: "Edit", "Send Back", "Delete", and a link labeled "Return to Previous Page".

Interview Evaluation page in administrative update mode (2 of 2)

Note. Only administrators can update submitted evaluations. The option for administrators to edit evaluations is available only if activated in the Recruiting Installation - Applicants page.

Administrator Actions

Edit

Click the Edit button to make a submitted evaluation editable. When the page changes to editable mode:

- The Send Back and Delete buttons disappear.
- The Save button appears.

To exit editable the page without saving changes, click the Return to Previous Page link.

- The Edited By, Date Edited, and Edit Evaluation Comments field appear.
- The administrator can update the original evaluator's ratings, recommendations, and comments.

Send Back Click this button to send the evaluation back to the original evaluator. Sending an evaluation back reverses the evaluation submission; it is as if the original evaluator saved it without submitting it.

If the administrator edited the evaluation before sending it back, changes to the original evaluator's data is kept, but the Edited By, Date Edited, and Edit Evaluation Comments fields are cleared.

Delete Click this button to delete the evaluation entirely. All data is cleared, and the system displays the page from which you accessed the evaluation.

The Interview Evaluations grid no longer displays data for the deleted evaluation. Instead, the Action field displays *Complete Evaluation*, the text that appears when no evaluation data exists.

Edit Mode Page Elements

These page elements appear after an administrator clicks the Edit button. If the administrator saves changes, these fields remain visible to anyone else who views the evaluation. These fields provide the only audit trail for modified evaluations. If the administrator later sends the evaluation back to the original evaluator, the system clears these fields, but retains any changes to the evaluation itself.

Edited By and Date Edited These fields display system-generated information about who edited the evaluation and when it was edited.

Edit Evaluation Comments An administrator who edits an evaluation uses this field to enter comments related to the edit.

Finalizing Interviews and Sending Evaluation Reminders

This section provides an overview of interview evaluation reminders and discuss how to send interview evaluation reminders.

Understanding Interview Finalization and Evaluation Reminders

The Interview Evaluation Reminder (HRS_INT_EVAL) Application Engine process performs these two tasks:

- Applies the interview status *Completed* when all evaluations for an interview have been completed.
- (Optional) Sends a notification (HRS_INTVW_EVAL_RMNDR) to interviewers who have not yet submitted evaluations for interviews that are complete.

The run control page for the process includes a check box that you use to indicate whether to perform this task.

To prevent the system from processing every interview in the system, you must specify a date range for the interviews to be processed. You can enter actual dates, or you can specify the number of days to look back from the current date.

Page Used to Finalize Interviews and Send Evaluation Reminders

| Page Name | Definition Name | Navigation | Usage |
|--------------------------------|-----------------|---|--|
| Interview Evaluation and Final | HRS_RUN_INT_REM | Recruiting, Administration, Interview Evaluation Reminder, Interview Evaluation and Final | Run a process to mark interviews complete and to optionally send interview evaluation reminders. |

Finalizing Interviews and Sending Evaluation Reminders

Access the Interview Evaluation and Final page (Recruiting, Administration, Interview Evaluation Reminder, Interview Evaluation and Final).

Interview Evaluation and Final

Run Control ID: PS [Report Manager](#) [Process Monitor](#)

Interviews Scheduled From: To:

-- OR --

Between: and: days prior to today

Send Evaluation Reminders

Interview Evaluation and Final page

Interviews Scheduled From and To Enter specific dates to be used when processing interviews. The system processes interviews that are scheduled on or between the dates you enter.

Between and And <number of> days prior to today Enter two numbers that define how many days to look back when processing interviews. For example, enter 1 and 7 to process interviews that are scheduled for one to seven days before the day that the process runs.

Send Evaluation Reminders

Leave this check box selected if you want the Interview Evaluation Reminder process to send reminder notifications to interviewers who have not completed evaluations for the interviews that the system processes. Deselect this check box to skip reminder processing.

Note. The Interview Evaluation Reminder process always applies the *Completed* status to completed interviews that it processes. There is no option to deactivate this part of the process.

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

After all of an applicant's interview evaluations are complete, the recruiter can make a final recommendation regarding the applicant. To make a final recommendation, use the Manage Applicant - Disposition Details: Interview page.

To make a final recommendation, enter a recommendation and an optional reason. These values come from the statuses that are defined for the Interview recruitment phase.

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

Prerequisite

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

See [Chapter 14, "Interviewing Applicants," Completing Interview Evaluations, page 448.](#)

Page Used to Make Final Recommendations

| Page Name | Definition Name | Navigation | Usage |
|---|-----------------|---|---|
| Manage Applicant - Disposition Details: Interview | HRS_APP_RCMNT | Recruiting, Find Applicants, Find Applicants In the applicant search results grid, click the Interview link in the Disposition column. | Recommend a disposition for an applicant after interviews are complete. |

Making Final Recommendations

Access the Disposition Details: Interview page (on the Find Applicants page, click the Interview link in the Disposition column).

Manage Applicant: Thomas Trummer

Disposition Details: Interview

Applicant Name: [Thomas Trummer](#) Date Entered: 06/25/2009
 ID: 600010 [Print Job Opening](#)

Posting Title: Administrative Assistant (Federal Operations) Job Opening ID: 600004
 Job Opening Status: 010 Open Job Type: Standard
 Job Title: Assistant-Administrative Job Code: 170005
 Position Number: 19000018 Administrative Assistant
 Business Unit: GBIBU Global Business Institute BU
 Job Family: KADMIN Administrative Support

[Return to Previous Page](#)

Interviews

Final Recommendation

Final Recommendation:
 Reason:
 Average Score: 7

Disposition Details: Interview page (1 of 2)

Interview Evaluations

[Customize](#) | [View All](#) | [First](#) | [1-3 of 3](#) | [Last](#)

| Interviewer | Job | Interview Rating | Interview Type | Recommendation | Score | Action |
|-------------------|--|------------------|----------------|----------------|-------|------------------------------------|
| Betty Locherty | Administrative Assistant | | Inhouse1 | | 0.000 | Evaluate Applicant |
| Jake Oglevy | Administrative Assistant | | Inhouse1 | | 0.000 | Evaluate Applicant |
| Ponciano Batalang | Administrative Assistant | Excellent | Inhouse1 | 020 Make Offer | 7.000 | Complete Evaluation |

[+ Create New Evaluation](#)

Interview Schedule

[Customize](#) | [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

| Date | Start Time | End Time | Time Zone | Interviewer | Location | Job | Comments |
|----------------------------|------------|----------|-----------|----------------|---|--|----------|
| 2009-07-31 | 5:00AM | 6:00AM | PST | Betty Locherty | 15 Porter Road Riverside New Granger Corporate Headquarters | Administrative Assistant | |

[Manage Interviews](#)

Disposition History

| Disposition | Status | Reason | Status Date | Offer ID |
|---------------------------|---------------|--------|-------------|----------|
| Interview | 005 Interview | | 07/14/2009 | |

▶ Edit Disposition Details

[Return to Previous Page](#)

Disposition Details: Interview page (2 of 2)

Final Recommendation

Final Recommendation Select a final recommendation.

Reason Select a reason for the final recommendation.

Interview Evaluations

This grid lists all scheduled interviewers and, for submitted evaluations, the overall rating and recommendation.

Action

Displays text that indicates the status of the evaluation. When appropriate, the Action column text is a link that the user clicks to access the Interview Evaluation page. Values in this column include:

- *Evaluate Applicant:* This appears when there is no evaluation data.

This is an active link only for an evaluator's own evaluation. Clicking the link displays the Interview Evaluation page, where the evaluator can begin the evaluation.

- *Complete Evaluation:* This appears when the evaluation has been saved, but not yet submitted.

This is an active link only for an evaluator's own evaluation. Clicking the link displays the Interview Evaluation page, where the evaluator can continue to work on the evaluation.

- *View Evaluation:* This appears when the evaluation has been submitted

This link is active regardless of who created the evaluation. Clicking the link displays the Interview Evaluation page in read-only mode.

- *Edit Evaluation:* Administrators see this instead of *View Evaluation* if you enabled administrator evaluation edits by selecting *Yes* in the Administrator Evaluation Edit field on the Recruiting Installation - Applicants page.

Clicking this link displays the Interview Evaluation page, but in this mode, the Save and Submit Evaluation buttons are replaced by buttons that the administrator can use to edit, delete, or send back the completed evaluation.

Interview Schedule

This group box displays the applicant's scheduled interviews.

Disposition History

This group box displays the applicant's disposition history.

Edit Disposition Details

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

See [Chapter 19, "Managing Applicants," Reviewing Disposition Details, page 571.](#)

Reviewing Interview Schedules and Evaluations

This section discusses how to:

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


Pages Used to Review Interview Schedules and Evaluations

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|---|------------------------|---|---|
| Manage Applicant page: Applicant Activity tab: Interview Schedule/Evaluation section | HRS_MANAGE_APP | Recruiting, Find Applicant Click an applicant name link in the Search Results grid on the Find Applicants page. Access the Applicant Activity tab: Interview Schedule/Evaluation section. | Review an applicant's interview schedule and interview evaluations. |
| Interview Calendar | HRS_INT_CLNDR | <ul style="list-style-type: none"> • Recruiting, Interview Calendar, Interview Calendar • Self Service, Recruiting Activities, Interview Calendar, Interview Calendar | Review the interview calendar for scheduled interviews to which you are associated. |
| Schedule Notes | ER_INTCMNT_MON_SEC | Click the Notes link on the Interview Calendar page | View schedule notes. |
| Interview Team Schedule | HRS_SEL_TEAM_SCHED | Self Service, Recruiting Activities, Interview Team Schedule, Interview Team Schedule | View a list of job openings or applicants where you are part of the interview team, and access detailed interview schedule information as needed. |



Reviewing Applicant Interview Schedules and Evaluations

Access the Manage Applicant page: Applicant Activity tab: Interview Schedule/Evaluation section (on the Manage Applicant page, click the Applicant Activity tab and then the Interview Schedule/Evaluation link).

Manage Applicant: Gregory Wu




 You have successfully scheduled an interview for Gregory Wu for the job HRIS Specialist -- 30017


| | | | |
|----------------------|--|------------------------|--------------------------|
| Name: | Gregory Wu | Applicant Type: | External Applicant |
| Applicant ID: | 1017 | POI Type: | |
| Contact: | Phone | Status: | 010 Active |
| Phone: | 404/289-6754 | Address: | 3400 Mountain View Drive |
| Email: | HCMGENUser1@ap6023fems.us.oracle.com | | Atlanta, GA 30080 |

  **Take Action:**

Applicant Activity
Contact Notes
Applicant Data

Current Status
Interview Schedule/Evaluation
Expenses

| Interview Schedule Customize Find View All  First 1-2 of 2 Last | | | | | | | |
|---|------------|----------|-----------|---------------------|----------|---------------------------------|---|
| Date | Start Time | End Time | Time Zone | Interviewer | Location | Job | Comments |
| 2009-06-08 | 9:30AM | 10:00AM | PST | Stephanie Jorgensen | | HRIS Specialist |  |
| 2009-06-02 | 3:00PM | 3:30PM | PST | Betty Locherty | | HRIS Specialist |  |

 [Manage Interviews](#)



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

| Interview Evaluations | | | | | | |
|-----------------------|---------------------------------|------------------|----------------|----------------|-------|------------------------------------|
| Interviewer | Job | Interview Rating | Interview Type | Recommendation | Score | Action |
| Betty Locherty | HRIS Specialist | | | | 0.000 | Evaluate Applicant |
| Jake Oglevy | HRIS Specialist | | | | 0.000 | Evaluate Applicant |

[+](#) [Create New Evaluation](#)

[Applicant Activity](#) [Contact Notes](#) [Applicant Data](#)

[Current Status](#) [Interview Schedule/Evaluation](#) [Expenses](#)



Take Action:

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

Interview Schedule

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

Job Click this link to display the Job Opening page.

Manage Interviews Click this link to access the Select Job Opening for Interview page, where you select one of the applicant's associated job openings before continuing to the Interview Schedule page to create or edit interviews.

Interview Evaluations

This grid lists all scheduled interviewers and, for submitted evaluations, the overall rating and recommendation.

Action

Displays text that indicates the status of the evaluation. When appropriate, the Action column text is a link that the user clicks to access the Interview Evaluation page. Values in this column include:

- *Evaluate Applicant:* This appears when there is no evaluation data.

This is an active link only for an evaluator's own evaluation. Clicking the link displays the Interview Evaluation page, where the evaluator can begin the evaluation.

- *Complete Evaluation:* This appears when the evaluation has been saved, but not yet submitted.

This is an active link only for an evaluator's own evaluation. Clicking the link displays the Interview Evaluation page, where the evaluator can continue to work on the evaluation.

- *View Evaluation:* This appears when the evaluation has been submitted.

This link is active regardless of who created the evaluation. Clicking the link displays the Interview Evaluation page in read-only mode.

- *Edit Evaluation:* Administrators see this instead of *View Evaluation* if you enabled administrator evaluation edits by selecting *Yes* in the Administrator Evaluation Edit field on the Recruiting Installation - Applicants page.


Clicking this link displays the Interview Evaluation page, but in this mode, the Save and Submit Evaluation buttons are replaced by buttons that the administrator can use to edit, delete, or send back the completed evaluation.

Reviewing Interview Calendars

Access the Interview Calendar page (Recruiting, Interview Calendar, Interview Calendar).

Interview Calendar

Betty Locherty

Display Week Of: 

[Previous Week](#) [Next Week](#)

2009-06-01

Monday 1 of 1

There are no interviews scheduled on this day

2009-06-04

Thursday 1 of 1

There are no interviews scheduled on this day

2009-06-02

Tuesday 1-3 of 3

| | | |
|-----------------------------------|--|-------------|
| Gregory Wu | 3:00PM - 3:30PM | PST |
| Job Opening: | 30017 | Unconfirmed |
| Location: | | |
| Bob Montana | 2:00PM - 3:00PM | PST |
| Job Opening: | 30017 | Scheduled |
| Location: | Room 1, ground Floor, global Business Centre, 548 Sydweigh Boulevard san Francisco | |
| Stewart Johannsen | 11:00AM - 11:30AM | PST |
| Job Opening: | 30017 | Unconfirmed |

2009-06-05

Friday 1 of 1

There are no interviews scheduled on this day

Interview Calendar page

Note. This is a partial screen shot.

Display Week Of Enter a date. The calendar shows the calendar for the week (Monday through Sunday) of the date you enter.

Previous Week and Next Week Click these links to move forward or backwards through the interview calendar.

<Day of Week>

Each weekday has its own section on the calendar; Saturday and Sunday appear together in the last section on the page. Interview data that appears on the calendar includes the applicant's name, the interview start and end time, the job opening, and the interview location. If you use full or partial calendar integration, the interview status also appears for each interview.

Chapter 15

Making Job Offers

This chapter discusses how to:

- Create job offers.
- Approve job offers.
- Edit or delete job offers.

Creating Job Offers

This section provides an overview of job offers, lists prerequisites, and discusses how to create job offers.

Understanding Job Offers

This section provides an overview of job offers.

Offer Creation

To prepare a job offer, use the Prepare Job Offer page.

Note. After you save or submit the job offer, the page title changes to Disposition Details - Offer.

Access the page by selecting the *Prepare Job Offer* action for an applicant. This action is available from multiple locations:

- The results grid on the Find Applicants page.
- The Manage Applicant page.
- The Applicants grid in the Manage Applicants section of the Job Opening page.

When you prepare an offer, the system provides default values when possible. For example, if the job opening has a primary hiring manager and primary recruiter, the system uses these as default values in the Hiring Manager and Recruiter fields on the Prepare Job Offer page. The system also enters the current date as the offer date. You can override these values.

You need to enter offer-specific details such as the start date for the job offer, the components of pay that you are offering the applicant, and the template to use for the offer letter.

Position and Job Code Information

The Prepare Job Offer page displays job information that comes from the job opening, including the business unit, position number, and job code. If the job opening is associated with multiple positions or job codes, you can select the one to which the offer applies.

There are two situations where position and job code data are not available to be brought into the job offer:

- If you initiate the offer process for an applicant who is not linked to a job opening.
- If you initiate the offer process for an applicant who is linked to a continuous job opening that doesn't have position or job code data.

In these situations, you must enter the necessary data on the Prepare Job Offer page. The requirements for position and job code data depend on your position management settings:

- *Full position management:* All offers must include a position number.

When you enter a position number in the job offer, the system brings in the associated job code.

- *Partial position management:*
 - Offers that are not associated with any job opening must include a job code; a position number is optional.
 - Offers that are related to continuous job openings can be submitted without a position or job code, but you will not be able to prepare the applicant for hire without at least a job code.

Online Job Offers

In the Recruiting Installation - Applicants page, you can configure the system to support online job offers for employees and for external applicants who are registered users of PeopleSoft Candidate Gateway. When this functionality is active, you can post offers to Candidate Gateway, and applicants can review the posted offers and then accept or reject the offer online.

When you post a job offer, the system sends the applicant an email notification with a link to Candidate Gateway. If the applicant's contact information doesn't have an email address, you cannot post the job offer online. The system also creates a contact note for the applicant, noting that the offer was posted.

When online job offer functionality is active, the Prepare Job Offer page displays several additional page elements that support the online job offer process, including:

- An Applicant section that displays certain applicant profile information, including the applicant type and whether the applicant is a registered user of Candidate Gateway.

This section also shows the applicant's preferred contact method and includes a Notify check box that must be selected before you post an offer online. Selecting the Notify button (which is selected by default for applicants whose preferred contact method is *Email*) causes the system to send the email notification to the applicant when you post the offer.

- An offer expiration date.

The system provides a default date that it calculates based on the system setting (in the Recruiting Installation - Applicants page) that specifies how many days online job offers remain active. You can override the default value.

When an online offer expires, it becomes read-only.

- An Attachments section for the files, URLs, and notes that you want to make available to the applicant along with the offer.

The offer letter that you generate is always added to the attachments grid. You can also manually add additional attachments, including both applicant-specific attachments that you manually upload and generic organizational documents that have been made available.

- Buttons for posting and unposting offers to Candidate Gateway.

You might unpost job offers if they have been withdrawn or modified. When you modify a job offer, saving the changes does not update the online offer in Candidate Gateway. Instead, you must unpost the offer and then repost it.

Offer Letters

When you enter job offer information, you choose a template to use for the offer letter.

When you submit the offer, the letter is added to the next run of the HRS Letter Generation process (HRSLETTER), which generates all queued letters as a batch process. However, you can instead generate the letter from the Prepare Job Offer page, which removes it from the queue for the HRS Letter Generation process. You can generate offer letters from any offer that does not have a status of *Draft* or *Pending Approval*.

To generate a letter from the job offer, use these links, which are only available if you have selected a letter template and submitted the offer:

- Generate Letter

Click this link to generate an offer letter based on the selected template. The letter opens in a new window where you can review and optionally update it. If you make changes, save the modified letter to your local disk so that you can upload the revised version.

When you generate the letter, the system enters the current date in the Date Printed field, generates a contact note for the applicant, and removes the letter from the Generate Recruitment Letters (HRSLETTER) process queue.

Note. The system does not create notes for offer letters that are generated in batch.

- Email Applicant

Click this link to access the Send Correspondence page. If you manually generated an offer letter, then the Send Correspondence page includes the offer letter as an attachment to the email. You can manually remove it from the Attachment grid. When you send the correspondence, the system generates a contact note for the applicant; the contact note includes any attachments that were in the email.

- Upload Letter

Click this link to upload a letter file from a local disk. Typically, you are uploading a modified copy of the letter that you created by clicking the Generate Letter link.

When you upload a letter, the system creates a contact note for the applicant. The contact note includes the offer letter attachment.

Components of Pay

The offer must include compensation information. This takes the form of one or more components of pay such as base salary, bonuses, car and meal allowances, and so forth. When you enter components of pay, you select from components that you set up in the Offer Component Type and Offer Component pages.

See [Chapter 6, "Setting Up Additional Recruiting Definitions," Setting Up Job Offer Components, page 103.](#)

Offer Statuses

Offer statuses are one of the six types of statuses that you configure when you set up recruiting statuses. The status change effects that are defined for the system will automatically update the offer status as appropriate, but you can also manually set the offer status except during the approval process.

When you create a new job offer, the system assigns the initial offer status. If approval processing is active, the initial status is *Pending Approval*. Once all approvals are complete, the status is *Extend*.

If approval processing is not active, the initial status is *Extend*.

If you use the Save for Later button to save your work without submitting the job offer, the system sets the status to *Draft*.

Prerequisites

Before you prepare a job offer, you must:

1. Set up the offer component type on the Offer Component Type page.
2. Set up the offer component on the Offer Component page.
3. Set up any organization-level attachments.
4. (Optional) Activate job offer approvals on the Recruiting Installation - General page.

See [Chapter 6, "Setting Up Additional Recruiting Definitions," Setting Up Job Offer Components, page 103.](#)

See [Chapter 2, "Defining Installation Options for Recruiting," Setting Up Talent Acquisition Manager Installation Settings, page 10.](#)

Pages Used to Prepare Job Offers

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|--------------------------------|------------------------|---|---|
| Find Applicant | HRS_REC_SCHAPP | Recruiting, Find Applicant | Search for and select applicants. |
| Prepare Job Offer | HRS_APP_RCMNT | Select <i>Prepare Job Offer</i> in the Take Action field in the Search Results group box on the Find Applicants page. | Create a job offer. |
| Organizational Level Documents | HRS_OFF_SELATC_SEC | In the Attachments section of the Prepare Job Offer page, select <i>Organizational Level Document</i> in the Source field and then click the Add Attachment link. | Select items from your organization's library of existing attachments, and attach them to the job offer. <i>See PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Working with Common Components," Configuring Attachments.</i> |
| Post Online Job Offer | HRS_OFFER_SEND_SEC | Click the Post button on the Prepare Job Offer page. | Post a job offer to Candidate Gateway. |

Creating a Job Offer

Access the Prepare Job Offer page (on the Find Applicants page, select *Prepare Job Offer* in the Take Action field in the Search Results group box).

Manage Applicant: Terry Shadbolt

Prepare Job Offer

Applicant Name: [Terry Shadbolt](#) Date Entered: 07/27/2004
 ID: 4

[Print Job Opening](#)

Posting Title: Administrative Assistant Job Opening ID: 30004
 Job Opening Status: 010 Open Job Type: Standard
 Job Title: Assistant-Administrative Job Code: 170005
 Position Number: 19000018 Administrative Assistant
 Business Unit: GBIBU Global Business Institute BU
 Job Family: KADMIN Administrative Support

Offer

[Return to Previous Page](#)

Prepare Job Offer page (1 of 4)

Offer Details

Job Opening: 30004 Administrative Assistant
 Business Unit:
 Position Number:
 Job Code:
 Offer Date:
 Commencement Date:
 *Offer Expiration Date:
 Hiring Manager: Jean Parsons
 Recruiter: Marc Kessler
 Created By:

Applicant

Applicant Type: Registered
 Preferred Contact: Notify

Status

*Status:
 Reason:

Offer Letter

Letter: Date Printed:

Prepare Job Offer page (2 of 4)

▼ Recommended Salary Range

| | Minimum | Midpoint | Maximum |
|---------|------------|------------|------------|
| Hourly | 16.044231 | 20.055289 | 24.066346 |
| Daily | 128.350000 | 160.440000 | 192.530000 |
| Monthly | 2781.000 | 3476.250 | 4171.500 |
| Annual | 33372.000 | 41715.000 | 50058.000 |

Job Offer Components

| *Component | *Offer Amount | Currency | Frequency | |
|---------------|---------------|----------|-----------|--|
| Base Salary ▼ | 4000.00 | USD ▼ | Monthly ▼ | |

[+ Add Offer Component](#)

Prepare Job Offer page (3 of 4)

Attachments

Job Offer Documents
Related Links
Notes

| Document Description | Attached File | Action Required | View | |
|-------------------------------|--|--------------------------|------|--|
| GBIBU Drug Testing Policy PDF | GBIBU_Substance_Abuse_and_Testing_Policy.pdf | <input type="checkbox"/> | | |
| GBIBI Benefits PDF | GBIBU_Benefits.pdf | <input type="checkbox"/> | | |

Source: Organizational Level Document ▼ [Add Attachment](#)

Comments

Added By:
Last Updated By:

[+ Add Another Comment](#) Previous Comment Next Comment

[Save for Later](#)
[Submit](#)
[Post](#)
[Add Revised Offer](#)
[Unpost](#)
[Delete Offer](#)
[Cancel](#)
[Return to Previous Page](#)

Prepare Job Offer page (4 of 4)

Print Job Opening

Click to access the Select Job Openings page, where you configure and generate a printed version of the job opening data.

See [Chapter 17, "Managing Job Openings," Printing Job Openings, page 535.](#)

Offer Details

| | |
|------------------------------|---|
| Job Opening | Displays the job opening ID and posting title. |
| Business Unit | Displays the business unit that is associated with the job opening. |
| Position Number | <p>This field appears only if the system is configured for full or partial position management. Under full position management, a position number is required. Under partial position management, it is optional.</p> <p>Initially, this field displays the position number, if any, that is associated with the job opening. If the job opening is associated with multiple positions, you can select any of the associated positions.</p> <p>If the offer is not associated with a job opening, or if it is associated with a continuous job opening that doesn't have position data, you can manually enter a value (and must do so under full position management).</p> |
| Works Council ID | <p>This field appears if the Optional Works Council option is selected on the Recruiting Installation - General page.</p> <p>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.</p> |
| Job Code | <p>Initially, this field displays the job code that is associated with the job opening. If the job opening is associated with multiple jobs, you can select any one of the associated job codes.</p> <p>If the offer includes a position number (required under full position management), the system enters the associated job code.</p> <p>If the offer is not associated with a job opening, then you must manually enter either a job code or position number.</p> <p>If the job opening is a continuous job opening without job code data, then the job code is optional. However, a job code will be required before you can prepare the applicant for hire.</p> |
| Offer Date | Enter the date the offer is effective. |
| Commencement Date | Enter the date that the applicant is to report for work. Although you can submit a job offer and generate an offer letter without entering a date, a valid job offer should include a commencement date. |
| Offer Expiration Date | <p>This field appears only if the system is configured to allow online job offers for this job opening's regulatory region.</p> <p>The field initially displays a default expiration date that is derived from the system-level default number of days that a job offer remains active (as configured on the Recruiting Installation - Applicants page).</p> <p>You can override the default date. The applicant's offer page in Candidate Gateway immediately reflects any changes that you make after the offer is posted.</p> |

| | |
|-----------------------|--|
| Hiring Manager | Displays the primary hiring manager for the job opening. |
| Recruiter | Displays the primary recruiter for the job opening. |
| Created By | Displays the originator of the job opening. |

Applicant

This section appears only if the system is configured to allow online job offers for this job opening's regulatory region.

Applicant Type Displays *Employee*, *External Applicant*, or *Non-Employee*. Non-employees are applicants who, although not current employees, already have data in the PeopleSoft HCM system.

Registered If the applicant type is *External Applicant* or *Non-Employee*, this check box is selected if the applicant is a registered user of Candidate Gateway. Only registered applicants can see online job offers.

Employees do not need to register to use Candidate Gateway, and therefore this check box is not selected if the applicant type is *Employee*.

Preferred Contact and Notify Displays the preferred contact method as established in the applicant's profile.

If the preferred contact method is *Email*, the Notify check box is selected and the system automatically sends an email notification when the job offer is posted.

If the preferred contact method is anything else, the Notify check box is initially not selected. Otherwise, you must select this check box before posting an online job offer.

Note. If the applicant does not have an email address on file, the system cannot send a notification.

Status

Status

Job offer statuses are configured in the Statuses and Reasons page. Oracle delivers a complete set of statuses and recommends that you use these delivered values.

Although you can manually select an offer status (except during approval processing), generally you can let the system set the value based on the actions you perform. For example, if you use the delivered statuses and you require approval for job offers, the default value for a new offer is *Pending Approval*. If offer approval is not required, the default value is *Extend*.

The delivered offer statuses are:

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

Reason

If your organization has set up reasons for a particular status, you can select a reason for putting the offer in a status. For example, reasons for the *Offer Rejected* status might include *Salary, Benefits, or Personal*.

See [Chapter 4, "Setting Up Recruiting Statuses," Defining Statuses and Reasons Codes, page 49.](#)

Offer Letter

Use this group box to create an offer letter.

See [Chapter 19, "Managing Applicants," Sending Correspondence and Recruitment Letters, page 591.](#)

Letter

Select a letter to send to the applicant. Talent Acquisition Manager delivers the following templates:

- HRS_OFF_LETTER_OF1
- HRS_OFF_LETTER_OF2

| | |
|------------------------|--|
| Date Printed | Displays the date that you printed the offer letter. The system populates the field when you click the Generate Letter link or when the offer letter is generated by the Generate Recruitment Letter Application Engine (HRSLETER) process. |
| Generate Letter | <p>This link is available only if the offer status equals <i>Extend</i>, the offer has been submitted, and a letter has not been generated.</p> <p>Click this link to generate the letter immediately. The system opens the generated letter in a new browser window, where you can print it or save it locally. Once the letter is generated, the Generate Letter link is no longer available and the letter is removed from the Generate Recruitment Letters (HRSLETTR) process. To make the link available again, clear the date in the Date Printed field.</p> <p>When you generate a letter, the system creates a contact note entry on the Manage Applicant - Contact Notes page. The letter is an attachment to the note.</p> <p>If you subsequently click the Email Applicant link, the system automatically attaches the generated letter to the email.</p> |
| Email Applicant | <p>Click this link to display the Send Correspondence page, where you can send the applicant email. If you have generated or uploaded an offer letter, the Attachments grid on the Send Correspondence page includes the offer letter (although you can remove or replace it if you wish).</p> <p>After accessing the Send Correspondence page, enter the email subject and message, then send it to the applicant. When you send the email, the system creates a contact note on the Manage Applicant - Contact Notes page; the email attachments are saved as note attachments.</p> |
| Upload Letter | <p>Click this link to upload a saved letter as an attachment. Most commonly, you use this link to upload a modified version of the original generated letter. However, it is not necessary to generate a letter before uploading one.</p> <p>Uploading a letter does not remove the original generated letter from the attachments grid, but you can remove the original letter manually if necessary.</p> <p>When you upload a letter, the system creates a contact note entry on the Manage Applicant - Contact Notes page. The letter is an attachment to the note.</p> <p>If you subsequently click the Email Applicant link, the system automatically attaches the modified letter (rather than the original) to the email.</p> |

Recommended Salary Range

Expand this section, which is initially collapsed, to see the salary range associated with the job opening.

Job Offer Components

The compensation package for an offer is made up of one or more job offer components. Every offer must include at least one offer component.

| | |
|------------------|----------------------------|
| Component | Select an offer component. |
|------------------|----------------------------|

- Offer Amount** Enter an amount. The system warns you if the amount is above or below the recommended salary range.
- Currency** Select the currency. The currency defaults to currency associated with the component.
- Frequency** Select a pay frequency. The frequency defaults to the frequency associated with the component.

Attachments

This section appears only if the system is configured to allow online job offers for this job opening's regulatory region. Use this section to manage the three kinds of job offer attachments: file attachments, links, and notes. If you post a job offer on Candidate Gateway, the applicant will see all of the attachments that you include here.

Job Offer Documents The grid under this tab shows the file attachments for the job offer. The systems creates rows for any offer letters that you generate or upload on this page. Offer letters that the HRS Letter Generation process (HRSLETTER) creates do not get added to the grid. In the grid, the editable Document Description column and the non-editable Attached File column display identifying information for the document. The default description for offer letters is *Offer Letter*.

Related Links The grid under this tab shows links that you attach to this job offer. Links are always organizational-level attachments. In the grid, the editable Link Description column and the non-editable URL column display identifying information for the link.

Notes The grid under this tab shows notes that you attach to this job offer. Notes are always organizational-level attachments. In the grid, the editable Note Description column displays identifying information for the note.

Action Required Select this check box for any job offer documents or links that the applicant must complete and return if the offer is accepted. In Candidate Gateway, an icon appears next to these documents, along with instructions to review the marked documents.

This check box does not appear in the Notes grid.



View

Click this icon to display the job offer documents or related links in a new browser window, or to display notes in the Job Offer Attachment Notes page.



Delete

You can delete rows from the attachment grids only when the offer is editable. When you access an existing offer, you must click the Edit Offer button to make the Delete icon appear in the attachment grids.

| | |
|--------------------------|---|
| Source | <p>Select the type of attachment to add to the job offer:</p> <ul style="list-style-type: none"> • An <i>Application Specific Document</i> is specific to this offer. • An <i>Organizational Level Document</i> is a general purpose file attachment, link, or note that your organization has made available. |
| Add Attachment | <p>If the source is <i>Applicant Specific Document</i>, clicking the Add Attachment link displays a Choose File dialog box, where you select a local file to upload.</p> <p>If the source is <i>Organizational Level Document</i>, clicking the Add Attachment link displays the Organizational Level Document page, where you can select existing attachments to add to the offer, or you can add ad hoc attachments to placeholders known as <i>document definitions</i>.</p> <p>The attachments and document definitions that appear on the Organizational Level Document page are context-dependent. For example, if an attachment is valid only for a particular business unit, then it is available only for job offers in that business unit.</p> |
| Comments | <p>Enter any comments that help explain the reasons behind the job offer details. Offer comments are only visible on the Prepare Job Offer page.</p> |
| Action Buttons | |
| Save for Later | <p>Saves the job offer and sets the status to <i>Draft</i>.</p> |
| Submit | <p>Saves the job offer and sets the status to <i>Pending Approval</i> if approval is required or sets the status to <i>Extend</i> if approval is not required.</p> <p>If approval is required, the page refreshes with a new title, Disposition Detail, the approval path, and links for Offer Details and Approvals.</p> <p>If the offer that you are submitting brings the total number of offers and hires over the number of target openings for a standard requisition, the system displays a warning. You can submit the offer anyway, but doing so can cause problems. The best practice is to promptly record rejected and withdrawn offers to avoid having too many offers active at once.</p> <p>See Chapter 15, "Making Job Offers," Approving Job Offers, page 485.</p> |
| Post | <p>This button appears only if the system is configured to allow online job offers for this job opening's regulatory region.</p> <p>Click this button to access the Post Online Job Offer page, where you complete the process of posting the job offer to Candidate Gateway. If the applicant is an external applicant who has not registered in Candidate Gateway, you will not be able to post the offer.</p> |
| Add Revised Offer | <p>This button is available if the offer has a status of <i>Rejected</i>. Click this button to add new job offer when the previous offer was rejected.</p> |

- Unpost** This button appears only if the system is configured to allow online job offers for this job opening's regulatory region and the applicant is a registered Candidate Gateway user.
- Click this button to remove a posted offer from Candidate Gateway. You might unpost job offers if they have been withdrawn or modified.
- Delete Offer** Users with Recruiting Administrator privileges on the Recruiting Row Level Security page can click this button to delete the offer. If the job offer has been posted to Candidate Gateway, deleting the offer also removes the posted offer.
- Cancel and Return to Previous Page** Click the Cancel button to reverse any unsaved changes on the page without leaving the page.
- Click the Return to Previous Page link to reverse any unsaved changes and return to the page from which you accessed the job offer.
- Edit Offer** When you initially access this page for an existing offer (in which case the name is Disposition Details - Offer), the offer is not editable. Click this button to make the fields on the page editable.
- When you modify a job offer, saving the changes does not update any online offer that has been posted to Candidate Gateway. Instead, you must unpost the offer and then repost it. If the posted offer has already been accepted, you will not be able to make material changes to the offer, but you can add additional attachments and add them to the online offer.

Disposition History

This grid displays the applicant's status change history for routings, interviews, and offers. These three recruiting areas have their own sets of statuses, separate from the applicant's overall disposition. For example, the delivered statuses for offers are the values that you select in the Status field on this page.

The first column in the grid displays the status type: *Route*, *Interview*, or *Offer*. Clicking the link changes the page to the Disposition Details page for the indicated recruiting area.

See [Chapter 19, "Managing Applicants," Reviewing Disposition Details, page 571.](#)

Attaching Organizational Level Documents

Access the Organizational Level Documents page (in the Attachments section of the Prepare Job Offer page, select *Organizational Level Document* in the Source field and then click the Add Attachment link).

Organizational Level Document

Select the attachments you wish to add to the job offer. If the Type is 'Document Definition' a new page will prompt for the Attachment, URL or Note information to be uploaded and it will have already been saved to the database when you are returned back to this page. For all other attachment types, they are saved to the database when you press 'Attach Selected Documents'.

| Job Offer Attachment Choices | | | | |
|------------------------------|--|------------|--|--------------------------|
| Select | View Attachment | Type | Attached File | Last Update Date/Time |
| <input type="checkbox"/> | Blue Telekom Group Med Aid App | Attachment | Blue_Telecom_Group_Medical_Aid_Application.doc | 10/02/2008 11:04:05AM |
| <input type="checkbox"/> | Proof of Citizenship Form | Attachment | Proof_of_Citizenship.doc | 10/02/2008 11:03:37AM |

[Select All](#) [Deselect All](#)

| Job Offer Document Definition Attachment Choices | |
|--|---------------------------|
| Description | |
| <input type="radio"/> | Drug Testing Requirements |
| <input type="radio"/> | Job Offer Notes |

Organizational Level Documents page

Job Offer Attachment Choices

This grid lists the organizational attachments and URLs that are valid for the job opening. For example, certain attachments might be valid for some business units but not others.

Select and Attach Selected Documents

Select one or more documents that you want to attach to the job offer, then click the Attach Selected Documents button. The documents are attached to the job offer immediately, but you remain on the current page until you click the OK button to return to the Prepare Job Offer page.

Note. The page does not indicate which attachments, if any, you have already attached to the document. If you accidentally add the same document multiple times, you can delete it from the job offer when you return to the Prepare Job Offer page.

Job Offer Document Definition Attachment Choices

This grid lists placeholders for specific types of documents that you can add to the offer.

Attach Document Definition

Select one of the document types that appear in the grid, then click the Attach Document Definition button to access the Existing Document Definitions page, where you can either select and attach preexisting attachments of this type or you can create a new one. Different types of documents support different combinations of attachment type (file attachment, URL, and note).

When you attach a document from the Existing Document Definitions page, the system attaches the document immediately.

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

Posting Job Offers to Candidate Gateway

Access the Post Online Job Offer page (click the Post button on the Prepare Job Offer page).

Post Online Job Offer

Review and Submit posting for this online job offer if the information is correct. To make changes, select Cancel to return to the offer page and edit the offer.

Offer

Offer Details

Applicant Name:

Applicant ID:

Job Opening: Event Coordinator

Offer Date:

Commencement Date:

*Offer Expiration Date:

Job Offer Components

| Component | Offer Amount | Currency | Frequency |
|---|---------------------------------------|-----------------------------------|---------------------------------------|
| Base Salary <input type="text" value=""/> | 2700.00 <input type="text" value=""/> | USD <input type="text" value=""/> | Monthly <input type="text" value=""/> |

Post Online Job Offer page (1 of 2)

| Status | | | |
|---|--|-------------------------------------|------|
| Status: | <input type="text" value="010 Extend"/> | | |
| Reason: | <input type="text"/> | | |
| Attachments | | | |
| Job Offer Documents Related Links Notes | | | |
| Document Description | Attached File | Action Required | View |
| <input type="text" value="Offer Letter"/> | <input type="text" value="2009-02-16-09.16.56.0000001011HRS_OFF"/> | <input checked="" type="checkbox"/> | |
| <input type="text" value="Proof of Citizenship Form"/> | <input type="text" value="Proof_of_Citizenship.doc"/> | <input type="checkbox"/> | |
| Comments | | | |
| <div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div> | | | |
| Previous Comment | | Next Comment | |
| <input type="button" value="Submit"/> <input type="button" value="Cancel"/> | | | |

Post Online Job Offer page (2 of 2)

Review the offer details on this page, then click the Submit button to post the offer.

When the offer is posted, the system generates a notification that appears on the applicant's Candidate Gateway Welcome page, sends an email to notify the applicant of the job offer, and creates a contact note.

You cannot post online job offers for applicants who have not provided an email address.

Approving Job Offers

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

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

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Approvals"

Understanding Job Offer Approvals

This overview discusses the job offer approval process.

Approval Process Activation

To use the approval process for job offers, select the Job Offers check box in the Approvals Required group box on the Recruiting Installation - General page. If your organization uses a works council, you must also select the Optional Works Council check box in the Approvals Required group box on the Recruiting Installation - General page.

Approver Actions

Each approver can take action on the request on the Manage Applicants - Disposition Details page, which they can access by using the link in the email notification that they receive or through the Pending Approvals component. Approvers can also add additional approvers or reviewers to an individual job offer by clicking on the Insert Approver icon on the Manage Applicants - Disposition Details page and entering information for the additional approver or reviewer on the Insert additional approver or reviewer page.

Approvers have the option of either:

- Approving the job offer.
- Denying the job offer.

The system sets the job offer status to Denied, stops the progress of the job offer, and notifies the hiring manager. However, the originator of the job opening can later resubmit the job opening.

- Pushing back the job offer.

The system notifies the previous approver that the job offer has been pushed back and needs his or her attention.

Note. The first approver cannot push back the job offer.

The Delivered Approval Process

PeopleSoft software delivers a three-step approval process for job offers. You can modify the approval process to fit your organization's business needs.

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 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 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Self-Service Transactions," Setting Up Access to Direct Reports Data.

3. If the first approver approves the job offer, the system notifies the second approver.

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 9.1 PeopleBook: Manage Labor Administration*, "Setting Up Works Councils."

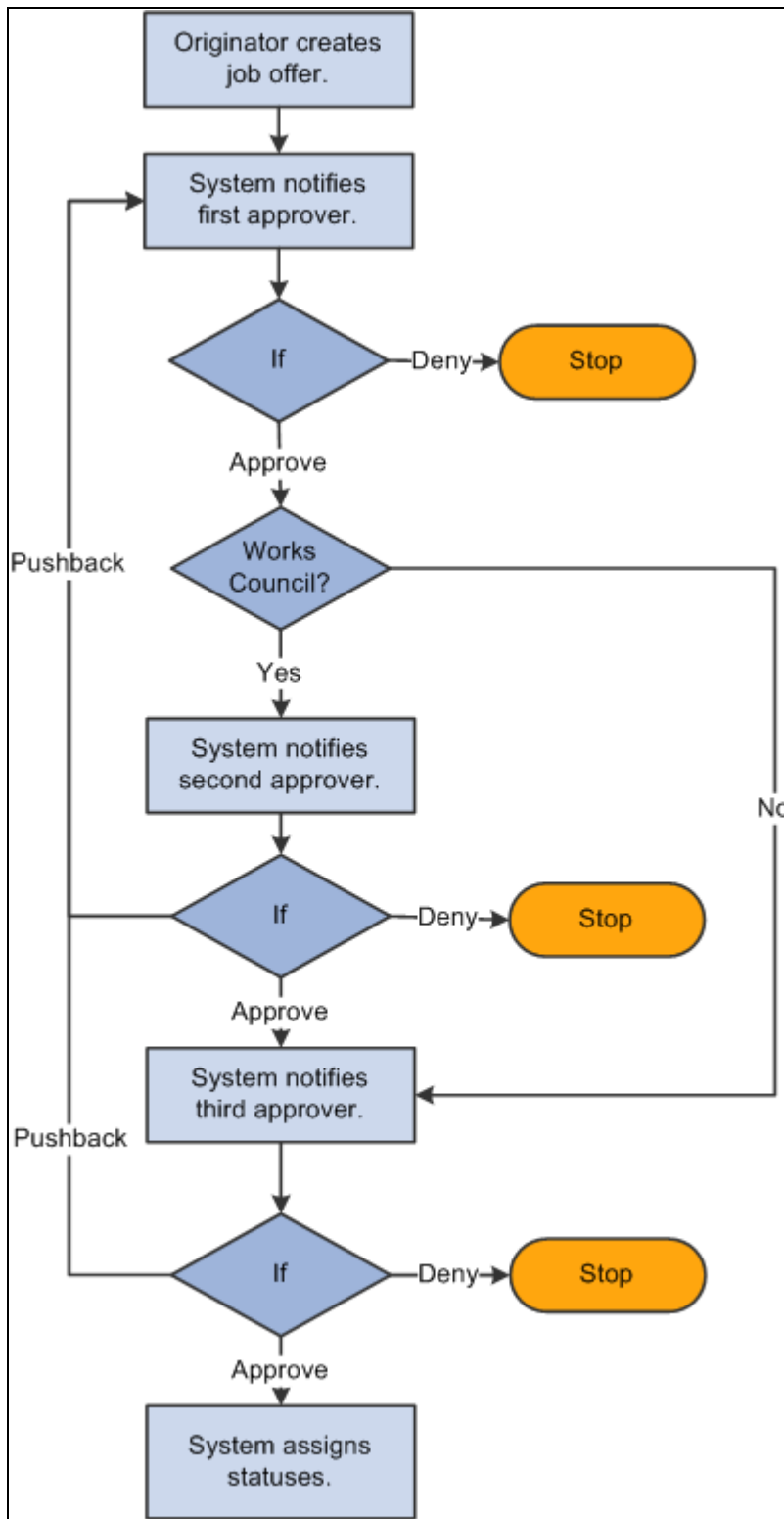
If there isn't a works council ID tied to the job offer, or if there is no one entered in the Spokesperson field, the system skips this approval step.

4. If the second approver approves the job offer, the system notifies the third approver.

The third approver is the recruiter or recruiters entered on the Job Opening or 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 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.

This diagram shows the delivered three-step job offer approval process, beginning with the creation of the job offer, continuing with the three approval stages, and ending with the final approval or denial:



Delivered job offer approval process with three approvers.

Job Offer Changes

During the approval process, an approver can change information on the job offer itself. If certain fields are changed that might require the job offer to be evaluated again, a trigger is created and the system sends a notification back to the first approver to start the approval process over. The fields that can cause a trigger to occur are:

- Offer Component
- Offer Amount
- Offer Currency
- Offer Frequency

Approval Delegation

If you enable delegation for job offer approval, approvers can delegate approval authority to proxies for specified amounts of time. The system gives the proxy access to the Pending Approvals component, which displays the job openings for which approval has been delegated.

See Also

[Chapter 9, "Understanding Approval Delegation in Talent Acquisition Manager," page 197](#)

Prerequisites

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

1. Set up works council IDs.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Labor Administration*, "Setting Up Works Councils."

2. Select the Optional Works Council option on the Recruiting Installation - General page.

See [Chapter 2, "Defining Installation Options for Recruiting," Defining General Settings for Templates, Approvals, and Integrations, page 11.](#)

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

See [Chapter 7, "Setting Up Recruiting Templates," Setting Up Job Opening Templates, page 130.](#)

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

See [Chapter 10, "Creating Job Openings," Entering Basic Job Information, page 228.](#)

See [Chapter 15, "Making Job Offers," Creating a Job Offer, page 473.](#)

Pages Used to Approve Job Offers

| Page Name | Definition Name | Navigation | Usage |
|--|--------------------|---|---|
| Pending Approvals | HRS_RECRUIT_CONSOL | Recruiting, Pending Approvals, Pending Approvals | View pending approvals and approve job offers. |
| Manage Applicant - Disposition Details | HRS_APP_RCMNT | Click the subject link on the Pending Approvals page. | Approve, deny, or push back a job offer. |
| Insert additional approver or reviewer | NA | <ul style="list-style-type: none"> 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 (Recruiting, Pending Approvals, Pending Approvals).

Pending Approvals

Customize | View All | First 1-6 of 6 Last

| | ID Nbr | Sender | Received | Subject |
|--------------------------|--------|-------------------|------------|---|
| <input type="checkbox"/> | 300162 | Ponciano Batalang | 05/20/2009 | Job Approval: Guest Manager |
| <input type="checkbox"/> | 300170 | Ponciano Batalang | 06/24/2009 | Job Approval: Client Service Manager (Core) |
| <input type="checkbox"/> | 300171 | Ponciano Batalang | 06/24/2009 | Job Approval: Manager Trainee (Core) |
| <input type="checkbox"/> | 300172 | Ponciano Batalang | 06/24/2009 | Job Approval: Public Relations Manager (Core) |
| <input type="checkbox"/> | 10261 | Betty Locherty | 05/20/2009 | Offer Approval: Elfrieda Penner |
| <input type="checkbox"/> | 503711 | Betty Locherty | 08/18/2009 | Offer Approval: Oona Marcel |

Pending Approvals page

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

Approving Job Offers

Access the Manage Applicant - Disposition Details page (click the subject link for a job offer approval on the Pending Approvals page).

On the Manage Applicant - Disposition Details page, click the Approvals link to display approval information.

Manage Applicant: Oona Marcel

Disposition Details: Offer

| | | | |
|---------------------|------------------------------------|-----------------------------------|------------|
| Applicant Name: | Oona Marcel | Date Entered: | 08/13/2009 |
| ID: | 500188 | Print Job Opening | |
| Posting Title: | Administrative Assistant | Job Opening ID: | 503711 |
| Job Opening Status: | 010 Open | Job Type: | Standard |
| Job Title: | Assistant-Administrative | Job Code: | 170005 |
| Position Number: | 19000018 Administrative Assistant | | |
| Business Unit: | GBIBU Global Business Institute BU | | |
| Job Family: | KADMIN Administrative Support | | |

[Offer Details](#) | [Approvals](#)

Supervisor/Recruiter Grp Aprv

Offer: Pending
 [Request Information](#)

Route to Supervisor/Recruiter

Pending

[Test User: HCQAN-MSPVR](#)
Hiring Manager Posn Supervisor

→

Not Routed

[Test User: HCQAN-R](#)
Offer Recruiter Group

Submit
Approve
Deny

Comments Text:

| Disposition History | | | | |
|-----------------------|----------------------|--------|-------------|----------|
| Disposition | Status | Reason | Status Date | Offer ID |
| Offer | 006 Pending Approval | | 08/18/2009 | 1131 |

Manage Applicant - Disposition Details page (2 of 2)



Click to add another approver or reviewer. A secondary page appears, where you select a user ID and whether you are adding an *Approver* or *Reviewer*.

Submit

Click to 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 <i>Denied</i> . |

Adding Another Approver or Reviewer

Access the Insert additional approver or reviewer page (click the Insert Approver icon on the Job Opening - Job Approvals page or the Manage Applicant - Disposition Details page).

See [Chapter 10, "Creating Job Openings," Adding Another Approver or Reviewer, page 298](#).

Editing or Deleting Job Offers

This section discusses how to edit or delete job offers.

Pages Used to Edit or Delete Job Offers

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|---|------------------------|--|--|
| Find Applicants | HRS_REC_SCHAPP | Recruiting, Find Applicants, Find Applicants | Search for and select applicants. |
| Manage Applicant - Disposition Details: Offer | HRS_APP_RCMNT | For an applicant with the disposition <i>Offer</i> , click the disposition link next to the applicant name in the Results group box on the Find Applicants page. | Edit or delete the job offer. Note. User must first click the Edit Offer button to edit the offer. |

Editing or Deleting Job Offers

Access the Manage Applicant - Disposition Details: Offer page (For an applicant with the disposition *Offer*, click the disposition link next to the applicant name in the Results group box on the Find Applicants page).

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

See [Chapter 15, "Making Job Offers," Creating Job Offers, page 469](#).

Note. If the job offer has been posted to Candidate Gateway, you must unpost it before editing or deleting it.

Chapter 16

Hiring Applicants

This chapter discusses how to:

- Complete pre-employment checks.
- Create applicant contracts.
- (AUS) Create salary packages.
- Hire applicants.
- (AUS) Copy salary packages to human resources.

Completing Pre-Employment Checks

This section provides an overview of pre-employment checks, lists a prerequisite, and discusses how to submit pre-employment check requests.

Understanding Pre-Employment Checks

Some organizations may use third-party vendors to perform pre-employment checks on applicants. When your organization sets up an agreement with a pre-employment check vendor, you nominate a recruiting administrator or recruiter as the HR manager for your organization. The HR manager has access to the administration functions to define the privileges of other users with access to the pre-employment vendor.

Prerequisite

Before you can request pre-employment checks, you must set up a vendor that performs pre-employment checks.

See [Chapter 8, "Setting Up Recruitment Sources and Third Party Integrations," page 155.](#)

Pages Used to Complete Pre-Employment Checks

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|------------------------------|------------------------|--|---------------------------------------|
| Pre-employment Check | HRS_PREEMPL_H | <p>Recruiting, Find Applicants, Find Applicants</p> <p>Click the applicant name link on the Find Applicants page.</p> <p>On the Manage Applicant page, select <i>Pre-Employment</i> from the Take Action field and click the Go button.</p> <p>The <i>Pre-Employment</i> value is available only if the system is set up to integrate with a third-party vendor that performs pre-employment checks.</p> | Submit pre-employment check requests. |
| Pre-employment Check Details | HRS_PREEMPL_D | Click the Details link in the Screening Inquiries group box on the Pre-employment Check page. | Review pre-employment check details. |

Submitting Pre-Employment Check Requests

Access the Pre-employment Check page (on the Manage Applicant page, select *Pre-Employment* from the Take Action field and click the Go button) .

Manage Applicant: John Lund

Pre-employment Check

Name: [John Lund](#) **Applicant Type:** External Applicant

Applicant ID: 34

Contact: Email **Status:** 010 Active

Phone: 360/222-3446 **Address:** 41 Pike Street

Email: HCMGENUser1@ap6023fems.us.oracle.com Seattle, WA 98330

Background Screening Provider:

| Screening Inquiries | | | | |
|---------------------|------------|--------------|----------------|---------------------|
| Provider | Request ID | Request Date | Status | Adjudication Status |
| HireRight, Inc | | 08/20/2009 | Request Failed | Not Displayed |

[Return to Previous Page](#)

Pre-employment Check page

Background Screening Provider Select the provider that is to perform the background check.

Request New Inquiry Click to submit the request. The system sends a message to the vendor.

Screening Inquiries

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

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

See [Chapter 8, "Setting Up Recruitment Sources and Third Party Integrations," Defining Settings for Pre-Employment Vendors, page 162.](#)

Details Click to access the Pre-employment Check Details page, where you can review status information for the pre-employment checks.

Creating Applicant Contracts

This section provides an overview of applicant contracts, lists prerequisites, and discusses how to:

- Define basic contract information.
- Define contract clause information.
- Define the signature date and probation information.

Understanding Applicant Contracts

If your organization uses employment contracts, you can use Talent Acquisition Manager to create applicant contracts and link them to an applicant during the prepare for hire process. If the employee is hired, this information is copied to the human resources database.

Prerequisites

Before you create an applicant contract, you must:

- Set up contract types.
- Set up contract clauses.
- Set up contract templates.

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

Pages Used to Manage Applicant Contracts

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|-------------------------|------------------------|---|------------------------------------|
| Contract Status/Content | HRS_APP_CNTRCT1 | Recruiting, Find Applicant Click the name link in the Search Results group box on the Find Applicants page. On the Manage Applicant page, select <i>Manage Applicant Contract</i> in the Take Action field. | Define basic contract information. |

| Page Name | Definition Name | Navigation | Usage |
|--|-----------------|--|--|
| Contract Clause | HRS_APP_CNTRCT2 | Select <i>Manage Applicant Contract</i> in the Take Action field on the Manage Applicant page. Select Contract Clause page. | Define contract clause information. |
| Signature Date/Probation Info (signature date/probation information) | HRS_APP_CNTRCT3 | Select <i>Manage Applicant Contract</i> in the Take Action field on the Manage Applicant page. Select the Signature Date/Probation Info page. | Define the signature date and probation information. |

Defining Basic Contract Information

Access the Contract Status/Content page (on the Manage Applicant page, select *Manage Applicant Contracts* in the Take Action field).

Contract Status/Content
Contract Clause
Signature Date/Probation Info

Applicant Name: Bill Smith **Applicant ID:** 78
Applicant Type: External Applicant **Empl ID:**

Applicant Information
Find | View All First 1 of 1 Last

| | |
|---|---|
| <p>*Contract Number: <input type="text" value="0001"/></p> <p>Contract Begin Date: <input type="text" value="08/19/2009"/> </p> <p>Contract End Date: <input type="text"/> </p> <p><input type="checkbox"/> Additional Contract</p> <p><input type="checkbox"/> More than one year expected</p> <p>Comment: <input type="text"/></p> <p>Comment: <div style="border: 1px solid black; height: 40px; width: 100%;"></div></p> | <p>*Contract Status: <input type="text" value="Active"/> </p> <p>Contract Expected End Date: <input type="text"/> </p> <p>*Regulatory Region: <input type="text" value="USA"/> </p> <p>Contract Template ID: <input type="text"/> </p> <p style="text-align: right;"><input type="button" value="Initialize Contract"/></p> |
|---|---|

Contract Status/Content page (1 of 2)

The screenshot shows a web form for Spain. At the top left, there is a dropdown menu with a Spanish flag and the text "Spain". Below this, there are two sections: "Probation/Vacation Info" and "Other Information".

Probation/Vacation Info: This section contains two pairs of input fields. The first pair is "Probation Period:" followed by a text input box and a "Months" dropdown menu. The second pair is "Vacation Period:" followed by a text input box and a "Months" dropdown menu.

Other Information: This section contains several fields:

- "Begin/End Week:" followed by a "Monday" dropdown menu, a colon, and a "Friday" dropdown menu.
- "Compensation Rate Description:" followed by a text input box.
- "Hiring Center:" followed by a text input box and a magnifying glass icon.
- "Scheme ID:" followed by a text input box and a magnifying glass icon.
- "Social Security Contribution:" followed by a text input box and a magnifying glass icon.

At the bottom of the form, there are two buttons: "Save" and "Return to Previous Page".

Contract Status/Content page (2 of 2)

Applicant Information

Contract Number Enter the contract number. The system automatically generates a number for you that you can change.

Contract Status Indicate whether the contract is *Active* or *Inactive*.

Contract Begin Date Enter the date when the contract begins. The current date is the default.

Contract Expected End Date Enter the date when you expect the contract will end.

Contract End Date Enter the date when the contract actually ended. This may differ from the date that you expect the contract to end.

Regulatory Region Select a regulatory region.

Additional Contract Select this check box if the worker already has at least one contract. deselect this option if this is the workers only contract.

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

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

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

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

(ESP) Spain

| | |
|--------------------------------------|---|
| Probation Period | If this worker's contract includes a probation period, use these two fields to specify how long it will be. Use the first field to enter the appropriate quantity and the second field to select a unit of time. Units of time are <i>none</i> , <i>Days</i> , <i>Months</i> , or <i>Years</i> . For example, if the probation period is six months, enter <i>6</i> in the first field, then select <i>Months</i> in the second field. |
| Vacation Period | Use these two fields to specify how much vacation the worker receives per year. Use the first field to enter the appropriate quantity and the second field to select a unit of time. Units of time are <i>none</i> , <i>Months</i> , <i>Natrl Days</i> (natural days), <i>Weeks</i> , or <i>Work Days</i> . For example, if the vacation period is 20 work days, enter <i>20</i> in the first field, then select <i>Work Days</i> from the options in the second field. |
| Begin/End Week | Specify the days when the worker's work week begins and ends. The default values are <i>Monday</i> and <i>Friday</i> . |
| Compensation Rate Description | Enter a free-form description of the worker's compensation rate. |
| Hiring Center | Select the hiring center responsible for hiring this person. |
| Scheme ID | Select a scheme ID. |
| Social Security Contribution | Select a social security contribution ID for the contract and scheme ID selected. The system uses both the scheme ID and the contribution ID for social security calculations, to determine the percentage or fixed amount that is applied to the calculation of a worker's contribution. |

Defining Contract Clause Information

Access the Contract Clause page (on the Manage Applicant page, select *Manage Applicant Contract* in the Take Action field).

| Contract Status/Content | | Contract Clause | | Signature Date/Probation Info | |
|---|--|---|------------|-------------------------------|---|
| Applicant Name: | Bill Smith | Applicant ID: | 78 | | |
| Applicant Type: | External Applicant | Empl ID: | | | |
| Applicant Information Find View All First 1 of 1 Last | | | | | |
| Contract Number: | 0001 | Begin Date: | 08/19/2009 | Contract Status: | Active + - |
| Contract Type: | <input type="text"/> | | | | |
| | <input type="checkbox"/> Extend Contract | | | | |
| ▼ Italy | | | | | |
| Plan ID: | <input type="text"/> | | | | |
| Reason: | <input type="text"/> | | | | |
| Contract Clause Find View All First 1 of 1 Last | | | | | |
| Contract Seq Nbr | Clause | Clause Status + - | | | |
| <input type="text" value="1"/> | <input type="text"/> | <input type="text"/> | | | |
| Long Description: | <input type="text"/> | | | | |
| Comment: | <input type="text"/> | | | | |
| <input type="button" value="Save"/> | | Return to Previous Page | | | |

Contract Clause page

Application Information

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

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

(ITL) Italy

Plan ID If the worker was assigned a contract type of *Training and Labor*, you must select a plan ID.

Reason If the worker was assigned a contract type of *Determined Period* contract, you must enter a reason for the contract.

Contract Clause

| | |
|---|--|
| Contract Seq# (contract sequence number) | When you add a clause to the contract, the system assigns a sequence number automatically. |
| Clause | Select a clause. |
| Clause Status | Defaults to the status that is associated with the clause that you selected. |
| Long Description | Enter a description. This description is used only for informational purposes. |
| Comment | Enter a comment. This comment is used only for informational purposes. |

Defining the Signature Date and Probation Information

Access the Signature Date/Probation Info page (on the Manage Applicant page, select *Manage Applicant Contract* in the Take Action field).

Signature Date/Probation Info page

Applicant Information

| | |
|---|---|
| Signature Date | Enter the contract's signature date. This information is required in some European countries, including Germany. |
| Maximum Hours and Minimum Hours | Enter the maximum and minimum contract hours. These values default from the values that you indicate on the Installation table for this contract. |
| Responsible ID | Enter the company agent who drafted the contract and who is responsible for its language. |

Probation Info

| | |
|-----------------------|--|
| Probation Date | Enter multiple probation dates if they are required for this worker. The probation date that you enter here also appears on the job data record for this worker. |
| Reason | Select a probation reason, including <i>New Date</i> and <i>Un-perform</i> (indicating additional probation time for failure to perform within expectations for the position). |

(AUS) Creating Salary Packages

This section provides an overview of salary packages.

Understanding Salary Packages

Salary package modelling enables you to explore different package scenarios to find satisfactory solutions and alternatives for applicant salary packages. You can save and report on any number of package variations during the modelling process.

You can create a salary package at any point in the recruiting process. When modelling salary packages for applicants, combine any number or type of components into a package to suit both the organization and applicant.

Creating salary packages for applicants is discussed in the *PeopleSoft Enterprise Human Resources PeopleBook: Administer Salary Packaging*.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Salary Packaging*, "Modelling Salary Packages," Pages Used to Model Salary Packages for Applicants.

Hiring Applicants

This section provides an overview of hiring applicants and discusses how to:

- Record an accepted offer.
- Prepare for hire.
- Review Search/Match results.
- Withdraw a hire request.

Understanding Hiring Applicants

This section provides an overview of the hiring process.

Offer Acceptance

Before the system will allow you to submit an applicant for hire, you need to record that the offer has been accepted. There are two ways that an applicant's offer acceptance is recorded:

- If the offer was posted to Candidate Gateway, the applicant can accept (or reject) the offer there.

See *PeopleSoft Enterprise Candidate Gateway 9.1 PeopleBook*, "Using Candidate Gateway," Reviewing and Responding to Online Job Offers.

- If a recruiting user records the offer acceptance, the user access the offer details on the Disposition Details: Offer page and changes the offer status there.

See [Chapter 16, "Hiring Applicants," Recording an Accepted Offer, page 509.](#)

In both situations, the system updates the offer status, which in turn triggers additional status changes. For example, if you use the delivered statuses and status change effects, then when you change the offer status to *020 Accept*, the applicant's disposition for the current job opening changes to *071 Offer Accepted* and the applicant's disposition for any other job openings changes to *100 Hold*.

Note. To record that an offer has been accepted, update the offer status. Do not update the disposition; the system's automated status change effects will do that for you.

See [Chapter 4, "Setting Up Recruiting Statures," Understanding Recruiting Statures, page 35.](#)

Prepare for Hire

The actual hiring process takes place in the HR system. In the recruiting system, you prepare the applicant for hire by using the Prepare for Hire page to verify job opening data and submit the hiring request to HR.

The Prepare for Hire page shows the job code or position that is tied to the job opening. If the applicant is not linked to a job opening, or if the job opening is a continuous job opening that doesn't have position or job code information, the system gets position and job code information from the job offer. If the job offer doesn't have position or job code information either, then you must enter at least a job code on the Prepare for Hire page.

Note. If you use full position management, then a position number is required for the job offer and when preparing to hire. If you use partial position management, then the job offer can be submitted without position or job code information, but a job code is required before you submit the applicant for hiring.

When you complete the Prepare for Hire page, you also enter the start date and hire type.

Employee ID Verification

Depending on whether the Employee ID Verification field on the Recruiting Installation - Applicants page is set to *Required* or *Optional*, you may be required to verify the employee ID before you submit the hire request to HR.

The Employee ID verification process enables you to check whether the applicant is already in the human resources database. You check by searching the database for personal data that matches the applicant's data.

PeopleSoft delivers two search rules that you can use when verifying the employee ID:

- Search Rule A (Search Order = 10): First Name, Last Name, National ID, Date of Birth are required.

- Search Rule B (Search Order = 10): First Name, Last Name are required.

See [Chapter 2, "Defining Installation Options for Recruiting," Defining Applicant-Related Settings, page 17.](#)

Hire Processing

When you submit the hire request, the system sets the disposition to *Ready to Hire* and sends a notification to the HR administrator. The applicant's name appears in the Manage Hire Results group box on the Manage Hires page. Applicant data is transferred to the HR database based on criteria defined on the Data Transfer to HR (HRS_MNG_HIR_STP) component.

After the applicant is hired in the Human Resources pages, the system:

- Sends the recruiter a notification that applicant was hired.
- Updates statuses as follows:
 - Sets the applicant's disposition with regards to the job opening to *Hired*, and also sets the overall applicant status to *Hired*.
 - Sets the job opening status to *Closed* if the Available Openings is zero.
 - Sets all other dispositions for other job openings for this applicant to *Reject*.
 - Sets the disposition for other applicants linked to this job opening to *Reject* if the available openings is zero.
- Updates the applicant record with the employee ID.
- Copies applicant data to human resources records.

The specific data elements that are transferred depend on the settings in the Manage Hire Setup page.

- Copies the contract information to human resource records.

Note. This list assumes that you use the delivered status change effects.

See [Chapter 4, "Setting Up Recruiting Statuses," Understanding Recruiting Statuses, page 35.](#)

The Withdraw From Hire Action

The Manage Hires page in the human resources system does not permit users to cancel hire requests for recruiting applicants. If it is necessary to cancel a hire request for an applicant, the cancellation request must originate in the recruiting application.

To initiate a cancellation request, use the *Withdraw From Hire* action for an applicant. This action is available only when the disposition is *Ready to Hire* and the job opening, if any, is in an *Open* status.

The results of the request depend on what stage the hire process has reached in the human resources system:

- If the request status is *Requested* and the applicant has not been processed at all, then the request status changes to *Cancelled* and the applicant no longer appears in the Manage Hires page.

- If the applicant has been partially or completely processed, then the request status changes to *Action Required* and a message is added to the Hire Comments field to alert the HR administrator to the situation.

Normally the Manage Hires page does not show hiring requests after the hiring administrator has finished personal data and job data processing, but the request reappears in the Manage Hires page when the cancellation requests updates the status to *Action Required*.

Regardless of what happens to the hire request in the Manage Hires page, submitting a hire cancellation request changes the applicant's disposition to *Withdrawn*.

Note. Recruiting users do not receive any messages regarding activity in the human resources system.

See Also

Chapter 2, "Defining Installation Options for Recruiting," Setting Up Talent Acquisition Manager Installation Settings, page 10

Chapter 6, "Setting Up Additional Recruiting Definitions," Setting Up the Data Transfer to HR, page 107

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Search/Match"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Increasing the Workforce," Hiring Job Applicants

Prerequisites

Before you can hire applicants, complete the following tasks:

1. Configure the integration broker.

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. Similarly, when you withdraw an applicant from hire, the system uses the WDRAW_HIRE_CONFIRM message to pass the request to the human resources system.

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), messages (HIRE_REQUEST and WDRAW_HIRE_CONFIRM), and routings must be active.

2. Use the Manage Hire Setup page to define the data you want to transfer from the applicant's record to the employee record.

If there is no data that is being transferred to the employee record, then the *Prepare for Hire* and *Withdraw from Hire* actions are not available.

See Also

Enterprise PeopleTools PeopleBook: Integration Broker

Chapter 6, "Setting Up Additional Recruiting Definitions," Setting Up the Data Transfer to HR, page 107

Pages Used to Hire Applicants

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|----------------------------|------------------------|--|--|
| Find Applicants | HRS_REC_SCHAPP | Recruiting, Find Applicants, Find Applicants | Search for applicants. |
| Job Opening | HRS_JO_360 | Recruiting, Find Job Openings, Find Job Openings Click a job name link on the Find Job Openings page. | Perform various tasks related to job openings. |
| Disposition Details: Offer | HRS_APP_RCMNT | Click the Disposition link in the Search Results grid on the Find Applicants page or in the Manage Applicants grid on the Job Opening page | Review information about the applicant's current disposition, and update the disposition to show that the applicant has accepted your offer. |
| Prepare For Hire | HRS_PREP_FOR_HIRE | Select the <i>Prepare For Hire</i> action in the Take Action field on the Find Applicants page or in the Manage Applicants grid on the Job Opening page. The <i>Prepare For Hire</i> action is available only for applicants whose disposition is <i>Offer Accepted</i> . | Review and complete job information and submit the hire request to the HR system. |
| Search Results | HCR_SM_RESULTS | <ul style="list-style-type: none"> Click the Verify Employee ID link on the Prepare For Hire page. If the system enforces employee ID verification, the page appears when you click the Submit button on the Add Person of Interest page. | Review Search/Match results to determine whether the applicant was a former employee, contingent worker, or person of interest. |

| Page Name | Definition Name | Navigation | Usage |
|--------------------|------------------------|---|--|
| Withdraw From Hire | HRS_ACT_APP_WDRAW | <p>Select the <i>Withdraw from Hire</i> action in the Take Action field on the Job Opening page: Manage Applicants tab: View Applicants section.</p> <p>The <i>Withdraw from Hire</i> action is valid only for applicants whose disposition is <i>Ready for Hire</i>.</p> | Confirm that a hire request is being withdrawn, and send a cancellation request to the human resources system. |

Recording an Accepted Offer

Access the Disposition Details: Offer page (click the Disposition link in the Search Results grid on the Find Applicants page or in the Manage Applicants grid on the Job Opening page).

Note. The Disposition Details: Offer page is identical to the Prepare Job Offer page.

See [Chapter 15, "Making Job Offers," Creating a Job Offer, page 473](#).

To record the offer acceptance:

1. Click the Edit Offer button.
2. If you use the delivered statuses, change the offer status to *020 Accept*; otherwise, select the value that your organization uses to record accepted offers.

If your organization has established reasons that are associated with this status, you can optionally select a reason for the acceptance.

3. Click the Submit button.

The system updates the offer status, which triggers status change effects such as updating the applicant's disposition to *071 Offer Accepted*.

See Also

[Chapter 4, "Setting Up Recruiting Statuses," Understanding Recruiting Statuses, page 35](#)

Preparing for Hire


Access the Prepare For Hire page (select the *Prepare For Hire* action in the Take Action field on the Find Applicants page or in the Manage Applicants grid on the Job Opening page).

Manage Applicant


Prepare For Hire

Manesh Bidar

To initiate a hire, rehire, transfer, additional job assignment, or to add a contingent worker assignment, select Save and Submit Request to HR.



| Prepare For Hire | | |
|-----------------------------|---|------------------------------|
| Application Status: | 071 Offer Accepted | |
| Status Last Updated: | 05/18/2009 | |
| Job Opening: | <input type="text" value="800013"/>  | Developer/Analyst |
| Job Opening Type: | Standard Requisition | |
| Position: | <input type="text"/> | |
| Job Code: | <input type="text" value="NF0009"/> | Developer/Analyst |
| Business Unit: | NFSBU | Federal Recruiting Solutions |
| Department: | NF004 | Information Systems |

Prepare For Hire page (1 of 2)

| | |
|-------------------------|---|
| Start Date: | <input type="text" value="09/02/2003"/>  |
| Date Applied: | 08/25/2003 |
| Applicant Type: | External - New |
| Type of Hire: | <input type="text"/> |
| Contract Number: | |
| Applicant ID: | Verify Employee ID |
| | Employee ID not verified |

Additional Hire Information

Send Offer Letter to HR

Hire Comments:  

Prepare For Hire page (2 of 2)

Prepare for Hire

Use this group box to enter the detail about the hire. The displayed information defaults to the information entered on the job opening.

| | |
|---------------------------|---|
| Job Opening | This defaults to the job opening you selected on the Find Applicants page. You can select another job opening |
| Position Number | <p>If the system is configured for full or partial position management, this field initially displays the primary position, if any, that is associated with the job opening. You can select another position number if more than one position is associated with the job opening.</p> <p>If your system is configured to use full position management, this field is required.</p> <p>If your system is configured to use partial position management, this field is optional.</p> |
| Job Code | <p>This defaults to the primary job code associated with the job opening selected on the Find Applicants page. You can select another job code if more than one job code is associated with the job opening.</p> <p>If you enter a position number, the system enters the associated job code and makes the field read-only.</p> <p>If the applicant is not linked to a job code or position, you are required to enter one.</p> |
| 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 <i>Add Contingent Worker</i> and <i>Hire</i> . For internal applicants that are non-employees, you can select only <i>Hire</i> . For internal applicants that are employees, you can select <i>Add Concurrent Job</i> , <i>Add Contingent Worker</i> , or <i>Transfer</i> . External applicants and employees who indicated that they are a former worker on the job application can also select <i>Rehire</i> . |
| Person Type | Displays the person of interest type if the applicant exists in the HR system as a person of interest. This field only appears on the page if the applicant exists in the system as a person of interest. |
| Verify Employee ID | Click to search the human resource database to see if the applicant was a former employee, contingent worker, or person of interest. This verification helps you avoid entering the same person into the system more than once. |

Additional Hire Information

Send Offer Letter to HR Select this check box if you want the system to include the job offer letter in the hire request message that it sends to the HR system. If you send the job offer letter, the Manage Hires Detail page in PeopleSoft Human Resources displays a link that the user can click to open the offer letter.

If there is more than one offer letter, this check box is not available, as the system is not able to determine which offer letter to send.

If you select this check box, the system confirms the existence of a job offer letter when you submit the hire request. If there is no offer letter to send, you can choose to cancel the request or to submit it without an offer letter. If you submit the request without an offer letter, the system deselects the check box.

This check box appears only if the Manage Hire Setup page is configured so that the applicable hire type sends the offer letter to the HR system.

See [Chapter 6, "Setting Up Additional Recruiting Definitions," Setting Up the Data Transfer to HR, page 107.](#)

Hire Comments Enter any comment that you want the HR administrator to see.

Save & Submit Request to HR

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

The system also checks to see if *Required* is selected for the Enforce Empl ID Verification field on the Recruiting Installation - Applicants page. If it is, you will be required to run the Verify Employee ID process.

Reviewing Search/Match Results

Access the Search Results page (click the Verify Employee ID link on the Prepare for Hire page).

Search Results

WARNING: Potential duplicates were found - this person may already exist in the database.

Refer to the list below for possible matches to the person you are adding.

After you select the return button at the bottom of the page, you'll be asked whether you want to continue adding this new person, or cancel this operation.

| ▼ Match Criteria | | | |
|-------------------------------------|--------------------------|----------|--------------|
| Data | | | |
| Required | Description | Usage | Search Value |
| <input checked="" type="checkbox"/> | First Name Search | Contains | HE |
| <input checked="" type="checkbox"/> | Last Name Search | Contains | HA |
| <input type="checkbox"/> | Middle Name | Contains | |
| <input type="checkbox"/> | Alternate Character Name | Contains | |
| <input type="checkbox"/> | Date of Birth | Equals | |

| ▼ Search Results Summary | |
|------------------------------|----|
| Number of ID's Found: | 47 |
| Search Order Number: | 20 |

Search Results page (1 of 2)

| Search Results | | | | | |
|----------------|----------|------------------------|--------------|---------------------|-------------|
| Results | | Additional Information | | | |
| | | Empl ID | Last Name | First Name | Middle Name |
| 1 | Carry ID | | | | |
| 2 | Carry ID | Z3049 | Chandara | Sheila | |
| 3 | Carry ID | TYCOHM10 | Ingham | Stephen | Reciprocity |
| 4 | Carry ID | TQ813 | SCHAPM-3R99A | ARHeadofHouseLowInc | |
| 5 | Carry ID | TQ807 | SCHAPM-3R99A | ARHeadofHousehold | |
| 6 | Carry ID | TQ2274 | Chambers | Matthew | |
| 7 | Carry ID | TQ2268 | Chambers | Christopher | |
| 8 | Carry ID | SRNZL3001 | Markham | Theresa | |
| 9 | Carry ID | SR13444 | Beckham | Katherine | |
| 10 | Carry ID | SF0216 | Hauer | Rochelle | |
| 11 | Carry ID | SF0114 | Thatcher | Stephen | |
| 12 | Carry ID | SEV0989 | Halcyon | D'orothea | |
| 13 | Carry ID | SEV0351 | Halcyon | D'orothea | |
| 14 | Carry ID | QFE05 | Cathay | Hermann | |
| 15 | Carry ID | MUTA117 | Baharati | Mukherjee | |

Return

Search Results page (2 of 2)

Return Click to return to the Prepare for Hire page without bringing over an employee ID.

Search Results: Results Tab

Carry ID Click to copy the employee ID to the Employee ID field on the Prepare for Hire page.

Search Results: Additional Information Tab

Person Organizational Summary Click to access the Person Organizational Summary page.
See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Increasing the Workforce," Reviewing Organizational Relationships.

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

Withdrawing a Hire Request

Access the Withdraw from Hire page (select the *Withdraw from Hire* action in the Take Action field on the Find Applicants page or in the Manage Applicants grid on the Job Opening page).

The screenshot shows a web interface for managing an applicant. At the top, it says "Manage Applicant: Chad Brown". Below that is the heading "Withdraw from Hire". The main content area shows "Applicant ID: 95". A modal window titled "Withdraw from Hire" is open, containing the following fields:

- Status:** 120 Withdrawn
- Status Date:** 01/27/2009 (with a calendar icon)
- Status Reason:** A dropdown menu.

At the bottom of the modal are two buttons: "Submit" and "Cancel".

Withdraw from Hire page

| | |
|----------------------|---|
| Status Date | Enter the date that the applicant's disposition changes from <i>Ready to Hire</i> to <i>Withdrawn</i> . The withdraw message is sent immediately, regardless of the date that you enter. |
| Status Reason | If your organization has defined status reasons for the <i>Withdrawn</i> status, select the appropriate reason. |
| Submit | Click this button to send the cancellation message to the human resources system. |

(AUS) Copying Salary Packages to Human Resources

This section provides an overview of how to copy salary packages to the human resource database.

Understanding How to Copy Salary Packages to the Human Resources Database

After you have received confirmation that the applicant has been hired, you want to copy the applicants salary package information to the human resource database.

Begin by searching for applicants with a status of Hired. Click the applicants name link on the Find Applicants page and from the Manage Applicant page, select *Copy Applicant to Employee* in the Take Action field.

Copying salary package information is discussed in the *PeopleSoft Enterprise Human Resources PeopleBook: Administer Salary Packaging*.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Salary Packaging*, "Modelling Salary Packages," Copying Applicant Salary Packages to the Employee Salary Package Component.

Chapter 17

Managing Job Openings

This chapter discusses how to:

- Search for job openings.
- Manage job openings.
- Print job openings.

Searching for Job Openings

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

- Search for job openings.
- Browse job openings.

Understanding Job Opening Searches

There are two methods of searching for existing job openings:

- Find Job Openings.

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

- Browse Job Openings.

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

Common Elements Used on Job Opening Search Pages

Create New Job

Click to access the Enter Primary Job Opening Information page, where you can create a new job.

Find Job Postings

Click to access the Search Postings - Basic Search page, where you can search for job postings.

See [Chapter 18, "Managing Job Postings," Searching for Job Postings, page 544.](#)

Pages Used to Search for Existing Job Openings

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|---------------------|------------------------|--|-----------------------------------|
| 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. |

Searching for Job Openings

Access the Find Job Openings page (Recruiting, Find Job Openings, Find Job Openings).

Find Job Openings

Enter Search Criteria

Job Opening ID:

Status:

Most Recent Activity:

Job Opening Type:

Hot Job:

Display Jobs:

Manager:

Recruiter:

Originator:

Business Unit:

Position Number:

Title:

Recruitment Contact:

Find Job Openings page (1 of 2)

Find Job Openings

View Job Opening Search Criteria

4 Results Found

| Search Results | | | | | | | | |
|--------------------------|------------------------------------|--------|----------------------|--------------------------|-----------------|--------------------|---------|------------|
| | Job Opening | ID Nbr | Type | Location | Target Openings | Available Openings | Hot Job | Created |
| <input type="checkbox"/> | HRMS Analyst-35000 | 300008 | Standard Requisition | | 1 | 1 | | 01/07/2009 |
| <input type="checkbox"/> | Analyst-HRMS | 290036 | Standard Requisition | Corporation Headquarters | 1 | 1 | | 06/10/2002 |
| <input type="checkbox"/> | HRMS Analyst | 35000 | Standard Requisition | | 1 | 1 | | 09/13/2004 |
| <input type="checkbox"/> | Administrator-HRMS | 10239 | Standard Requisition | Corporation Headquarters | 1 | 1 | | 03/27/2006 |

Select All Deselect All Select Action... Go

Create New Job Browse Job Openings Find Job Postings

Find Job Openings page (2 of 2)

Enter Search Criteria

Initially, the Enter Search Criteria section is expanded and displays all available search fields. After you perform a search, this section is collapsed, and the title changes to View Job Opening Search Criteria. You must expand the section before you can revise your criteria and perform another search.

- Search** Click this button to search for job openings that meet the criteria you've entered.
- Reset** Click this button to clear all of the search criteria fields, including the default value in the Status field.
- Job Opening ID** Enter or select a single job opening ID. Searching by ID is the most efficient way to access the record for a specific job opening whose ID you know.
- Status** Select the status to include in the search. The default value is *Open*. You can clear the field, or select one of these other options: *Canceled, Closed, Denied, Draft, Hold, and Pending*.
- Most Recent Activity** To search based on how recently the job opening has had activity, select the time period to check for activity: *Today, Yesterday, Last 3 Days, Last Week, Last 2 Weeks, Last Month, Last Year, or View All*.
- Job Opening Type** Select the type of jobs to include in the search: *Continuous Job Opening or Standard Requisition*.
- Hot Jobs** Select *Yes* or *No* to filter results according to whether the job opening has been identified as a hot job.

| | |
|--|---|
| Display Jobs | Select which jobs to include in the search based on your role relative to the job opening. Options are: <ul style="list-style-type: none"> • <i>All Jobs.</i> • <i>Jobs Assigned to me.</i> A job is assigned to you if you are the primary hiring manager or primary recruiter. • <i>Jobs Associated to me.</i> A job is associated with you if you created it or you are on the hiring team. • <i>Jobs Created by me.</i> |
| Manager, Recruiter and Originator | Enter or select the employee ID of a person associated with the job opening. |
| Business Unit | Enter or select a business unit to include in the search. |
| Position Number | Enter or select a position to include in the search. |
| Title | Enter words to look for in the job posting title. The system searches for job openings that contain the words you enter; an exact match is not necessary. |
| Recruitment Contact | Select an external recruitment contact to include in the search. |

Search Results

The Search Results grid displays the job openings that meet your search criteria. The columns in the grid correspond to the similarly-named search fields and job opening fields.

| | |
|---|---|
| Job Opening | Displays the primary posting title for the job opening. If no job postings exist, this is the posting title that was initially entered on the Enter Primary Job Information page. The posting title is a link that you click to access the Job Opening page. |
| Target Openings and Available Openings | Displays information about the total number of positions to be filled and the number that have not yet been filled. |
| Hot Job | Displays <i>Y</i> (yes) or <i>N</i> (no) to indicate whether the job opening is a hot job. |

Page Elements for Performing Actions

- Select Action and Go** Select an action to perform on the selected job openings (those where you selected the check box next to the job title), then click the Go button to perform the action.
- The available actions depend on your search criteria:
- The *Add Note* action is always available.

Select this action to create a note that will be added to all of the selected job openings.
 - If you searched for job openings where the status is *Draft*, the *Delete* action is available.

Performing this action deletes the selected draft job openings immediately, without asking for user confirmation.
 - If you searched for job openings where the status is *Pending* or *Denied*, three approval-related actions are available: *Approve*, *Deny*, and *Pushback*.

Important! If a user other than the assigned approver (or that approver's proxy) initiates an approval-related action on the Find Job Openings page or the Browse Job Openings page, the action will *not* update the job opening. Administrators must perform approval actions on the Job Opening page. This ensures that the administrator reviews the job opening data before taking action.

 - If you searched for job openings where the status is *Open*, three additional status-related actions are available: *Cancel*, *Close*, and *Hold*.

Performing these actions makes a corresponding status change to all selected job openings.
- Browse Job Openings** Click this link to access the Browse Job Openings page.

Browsing for Job Openings

Access the Browse Job Openings page (Recruiting, Browse Job Openings, Browse Job Openings).

Browse Job Openings

[View Drafts](#) [Find Job Openings](#)

Job Openings

Display: Job Assigned to me Open Active within Last Month

Job Openings Status: Open Customize | Find | View All | | First 1 of 1 Last

| Select | Job Opening | ID Nbr | Type | Location | Target Openings | Available Openings | Hot Job | Created |
|--------------------------|---|--------|----------|--------------------------|-----------------|--------------------|---------|------------|
| <input type="checkbox"/> | Clerical Assistant - Medical Claims | 503706 | Standard | Corporation Headquarters | 10 | 10 | | 08/04/2009 |

[Select All](#) [Deselect All](#) Select Action... [Go](#)

[Create New Job](#) [Find Job Openings](#) [Find Job Postings](#) [View Drafts](#)

Browse Job Openings page

The list of job openings that meet your filtering criteria appears in a grid with the same columns as the Search Results grid on the Find Job Openings page.

View Drafts

Click to update change the page's display filters and refresh the view so that only jobs with *Draft* status appear.

The system sets the first display field (which filters based on your relationship to the job) to *All Jobs* and sets the second filter (which filters on status) to *Draft*. The third display filter retains its previous value.

Find Job Openings

Click to display the Find Job Openings page.

Job Openings

Display

There are three drop-down list boxes for filtering job openings. After changing values in any of these fields, click the refresh icon to apply the selected filter.

The first drop-down list enables you to filter according to your relationship with the job opening. *Jobs Associated with me* are job openings that you created or where you are part of the hiring team. *Jobs Assigned to me* is a subset of the jobs associated with you; it includes only job openings where you are either the primary recruiter or the primary hiring manager. This is the default value. The other filtering options are *Jobs Created by me* and *All Jobs*.

The second drop-down list box enables you to filter by status. The default value is *Open*. Other values include *All*, *Canceled*, *Closed*, *Denied*, *Hold*, and *Pending*.

The third drop-down list box enables you to filter by how recently the job opening has been active. The default value, *Active with View All*, does not filter based on when the job was active. To apply a filter, choose from the following values: *Active within Today*, *Active within Yesterday*, *Active within Last 3 Days*, *Active within Last Week*, *Active within Last Two Weeks*, *Active within Last Month*, and *Active within Last Year*.

Select Action and Go Select an action to perform on the selected job openings (those where you selected the check box next to the job title), then click the Go button to perform the action.

The available actions depend on the value in the second Display field (the one used to filter by job opening status):

- The *Add Note* action is always available.

Select this action to create a note that will be added to all of the selected job openings.

- If you show job openings where the status is *Draft*, the *Delete* action is available.

Performing this action deletes the selected draft job openings immediately, without asking for user confirmation.

- If you show job openings where the status is *Pending* or *Denied*, three approval-related actions are available: *Approve*, *Deny*, and *Pushback*.

Important! If a user other than the assigned approver (or that approver's proxy) initiates an approval-related action on the Find Job Openings page or the Browse Job Openings page, the action will *not* update the job opening. Administrators must perform approval actions on the Job Opening page. This ensures that the administrator reviews the job opening data before taking action.

- If you show job openings where the status is *Open*, three additional status-related actions are available: *Cancel*, *Close*, and *Hold*.

Performing these actions makes a corresponding status change to all selected job openings.

Managing Job Openings

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

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

Understanding Job Opening Pages

The Job Opening page provides a single point from which you can complete many job-related and applicant-related recruiting tasks. It includes four tabs:

- **Manage Applicants**

Use this tab to review applicants and perform various applicant-related tasks. This tab includes sections for viewing applicants (and performing applicant-related actions), screening applicants, and managing interview schedules.

See [Chapter 19, "Managing Applicants," Actions in the Take Action Field, page 559](#); [Chapter 13, "Screening and Routing Applicants," page 377](#) and [Chapter 14, "Interviewing Applicants," page 423](#).

- **Find Applicants**

Use this tab to search for applicants to link to the job opening. The applicant searches are the same as those you perform outside the context of the job opening.

See [Chapter 12, "Searching for Applicants," Performing Applicant and Profile Searches, page 347](#).

- **Activity and Attachments**

Use this tab to review job activity, notes, attachments, and expenses.

See [Chapter 17, "Managing Job Openings," Reviewing Job Opening Activity, page 530](#).

- **Job Opening Details**

Use this tab to review the job opening data, including general job information, job qualifications, job postings, and the hiring team. The tab contents correspond to the page where you originally created the job opening.

See [Chapter 10, "Creating Job Openings," page 205](#).

Common Elements Used in This Section



This icon appears next to the job title when the job is a hot job.

See [Chapter 21, "Managing Employee Referral Programs," Managing Hot Jobs, page 694](#).



Save

Click to save your work.



Clone

Click to clone the current job opening. The system displays the Clone Job Opening page.



Create New

Click to create a new job opening. The system displays the Enter Primary Job Information page.

Previous Job Opening

Click to display the previous job opening from the Find Job Openings or Browse Job Openings list.

- Next Job Opening** Click to display the next job opening from the Find Job Openings or Browse Job Openings list.

- Job Opening List** Click to display either the Find Job Openings or Browse Job Openings page, with your previous search or filter criteria intact.

Pages Used to Manage Job Openings

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|--|------------------------|---|--|
| Find Job Openings | HRS_JO_FIND_JOB | Recruiting, Find Job Openings | Search for and select job openings. |
| Job Opening | HRS_JO_360 | Click the job opening link in Search Results group box on the Find Job Openings page. | Manage all aspects of a job opening, including managing applicants, finding applicants, reviewing activity, creating notes, attachments, and expenses, and viewing or updating the job opening itself. |
| Job Opening page: Manage Applicants tab: View Applicants section | HRS_JO_360 | This is the section you see when you initially access the Job Opening page. | Review applicants for a job opening, and perform various applicant-related activities. |
| Job Opening page: Find Applicants tab | HRS_REC_SCHAPP | Click the Find Applicants tab on the Job Opening page. | Search for applicants for the job opening. |
| Job Opening page: Activity & Attachments tab | HRS_JO_360 | Click the Activity & Attachments tab on the Job Opening page. | Review job status history, notes, attachments, expenses, and saved results from applicant searches. |
| Add Note | HRS_JO_NOTE_SEC | Click the Add Note link on the Job Opening page: Activity & Attachments tab. | Add a note to a job opening. |
| Add Expenses | HRS_JO_EXPENSE_SEC | Click the Add Expense link on the Job Opening page: Activity & Attachments tab. | Add an expense to a job opening. |
| Job Opening page: Job Opening Details tab | HRS_JOB_OPENING | Click the Job Opening Details tab on the Job Opening page. | Review or edit job opening details. |

Reviewing Applicants Linked to Job Openings

Access the Job Opening page: Manage Applicants tab: View Applicants section (on the Find Job Opening page, click the job opening link in Search Results group box).

Find Job Opening

Job Opening

Posting Title: Eben Director


Job Opening Status: 010 Open

Job Title: Eben Director

Position Number: Z9944888 Eben Director

Business Unit: ZBU00 eBenefits Business Unit 1




Job Family:

 [Print Job Opening](#)

Job Opening ID: 994488

Job Type: Standard

Job Code: Z00006




 [Save](#)
 [Clone](#)
 [Create New](#)
[Previous Job Opening](#) | [Next Job Opening](#) | [Job Opening List](#)

[Manage Applicants](#) | [Find Applicants](#) | [Activity & Attachments](#) | [Job Opening Details](#)

[View Applicants](#) | [Screen Applicants](#) | [Interview Schedule](#)

Manage Applicants

Display:

| Applicants | | | | | | | | |
|--------------------------|---------------------------------|--------|------|-------------|---|--|-------------------|---|
| Select | Applicant Name | ID | Type | Disposition | Resume | Application | Last Updated | *Take Action |
| <input type="checkbox"/> | Ganquly Sarbani | 167 | Ext | Hold |  |  | 12/20/2005 7:21PM | <input type="text" value="Select Action..."/> |
| <input type="checkbox"/> | Rupinder Arora | 100133 | Ext | Ready | |  | 12/20/2005 7:22PM | <input type="text" value="Select Action..."/> |

[Select All](#) | [Deselect All](#) | *Group Action:

Job Opening page: Manage Applicants tab: View Applicants section

Print Job Opening

Click to access the Select Job Openings page, where you configure and generate a printed version of the job opening data.

Screen Applicants

Click this link to access screening-related functionality.

See [Chapter 13, "Screening and Routing Applicants," page 377](#).

Interview Schedule

Click this link to access interview-related functionality.

See [Chapter 14, "Interviewing Applicants," page 423](#).

Manage Applicants

Display To show only applicants who are at a specified stage in the hiring process, select the stage. The values in the drop-down list box correspond to the values that you see in the Disposition column in the Applicants grid.

Select *All*, which appears at the end of the list, to view all applicants without regard to their disposition.

Applicants

This grid displays applicants who are linked to the current job opening.

Select Use this check box to select applicants who will be affected by an action that you perform using the Group Action field.

Applicant Name and ID These fields display identifying information about the applicant. Click the Applicant Name link to display the Manage Applicant page, where you can see more detailed information about the applicant.

Type Possible applicant types are *Emp* (employee), *Ext* (external applicant), or *Oth* (other).

The *Oth* value appears when the applicant type is *Non-Employee*, a value generally used for applicants who, although not current employees, already have data in the PeopleSoft HCM system.

Disposition Displays the applicant's current status in the hiring process.

Certain dispositions (those that are in the Screen, Route, Interview, and Offer phases) are links. Click the link to display the Disposition Details page where you can view and update disposition information.

See [Chapter 19, "Managing Applicants," Reviewing Disposition Details, page 571.](#)

Dispositions that are in the Review, Applied, Hire, and Reject phases are not links.

See [Chapter 4, "Setting Up Recruiting Statuses," Defining Statuses and Reasons Codes, page 49.](#)

Resume

Click to open a new window that displays the applicant's resume.

- If the resume is an attachment, the file opens in the new window.
- If the resume was entered into the Resume Text field in the application, the new window displays the Applicant Resume page.
- If no resume exists for a particular applicant (for example, the applicant instead completed the work experience fields in the online application), then this column is blank.

If none of the applicants in the grid have resumes, the entire Resume column is hidden.

Application

Click to open a new window that displays the Application Details page, where you can review the applicant's complete application. The Application Details page appears in read-only mode.

Last Updated

Displays the date and time that the application disposition was last modified

Take Action

Select an action to be performed on a specific applicant. The system performs the action immediately.

Use the Take Action field in the Applicants grid to perform actions that relate to the specific job application. (However, some of the available actions affect the overall applicant record.) When you select an action, the system immediately initiates it; you do not need to click a separate Go button.

In this context, the available actions are *Add Applicant to New List*, *Add Applicant to Saved List*, *Change Applicant Status*, *Copy Applicant to Employee*, *Create Interview Evaluation*, *Create Salary Package Model*, *Forward Applicant*, *Link Applicant to Job*, *Manage Applicant Checklists*, *Manage Interviews*, *Pre-Employment Check*, *Prepare for Hire*, *Prepare Job Offer*, *Print Application Details*, *Reject Applicant*, *Route Applicant*, *Send Correspondence*, and *Withdraw from Hire*.

See [Chapter 19, "Managing Applicants," Actions in the Take Action Field, page 559](#).

Group Action

Group Action and Go Select an action to be performed on all selected applicants. Unlike actions performed on a single applicant using the Take Action field, the system does not perform the action immediately. Instead, you must click theGo button to initiate the selected action.

Generally, the actions available as group actions are a subset of the actions that you can perform on individual applicants. These are the actions that you can *not* perform on a group: *Copy Applicant to Employee*, *Create Salary Package Model*, *Manage Applicant Checklists*, *Pre-Employment Check*, *Prepare for Hire*, *Prepare Job Offer*, and *Withdraw from Hire*.

Additionally, the *Edit Applicants* action is exclusively a group action. Perform this action to open the Application Details page. When you access the Application Details page this way:

- The page initially displays the first selected application,
- The Previous Applicant and Next Applicant links enable you to page through all of the applicants in your original selection.
- The Applicant List link returns you to the Job Opening page.

Reviewing Job Opening Activity

Access the Job Opening page: Activity & Attachments tab (on the Job Opening page, click the Activity & Attachments tab).

Find Job Opening

Job Opening

Posting Title: Eben Director

Job Opening Status: 010 Open

Job Title: Eben Director

Position Number: Z9944888 Eben Director

Business Unit: ZBU00 eBenefits Business Unit 1

Job Family:

[Print Job Opening](#)

Job Opening ID: 994488

Job Type: Standard

Job Code: Z00006

[Save](#)
 [Clone](#)
 [Create New](#)

[Previous Job Opening](#)
[Next Job Opening](#)
[Job Opening List](#)

Manage Applicants

Find Applicants

Activity & Attachments

Job Opening Details

Job History | [Find](#) | [View All](#) | | [First](#) | 1-2 of 2 | [Last](#)

| Date | Subject | Reason | Action Taken By |
|------------|----------|--------|-----------------|
| 04/14/2003 | 010 Open | | Betty Locherty |
| 04/14/2003 | 010 Open | | Betty Locherty |

Searches

No searches are related to this Job Opening.

Job Opening page: Activity & Attachments tab (1 of 2)

Copyright © 1988, 2010, Oracle and/or its affiliates. All Rights Reserved.

531

| Notes | | | | | |
|--------|----------------------|------------|----------------|----------------------------|--|
| | | | | | |
| ID Nbr | Subject | Note Date | Author | View Notes | |
| 1 | Note to interviewers | 08/18/2009 | Betty Locherty | View Notes | |

[+ Add Note](#)

| Attachments | | | | | |
|---------------------------------------|----------------------|----------------------|-------------------|----------------|--------|
| | | | | | |
| File Name | Description | Audience | Updated | Uploaded By | Delete |
| Interviewing_Tips.doc | <input type="text"/> | <input type="text"/> | 08/18/2009 5:08PM | Betty Locherty | |

[+ Add Attachment](#)

| Expenses | | | | | |
|-------------|----------|----------|------------|--------------|---------------------------------|
| | | | | | |
| Expense | Amount | Currency | Date | Display Name | Expense Details |
| Publication | \$500.00 | USD | 08/18/2009 | | Expense Details |

[+ Add Expense](#)

Job Opening page: Activity & Attachments tab (2 of 2)

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

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.

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 (on the Job Opening page: Activity & Attachments tab, click the Add Note) link).

The screenshot shows the 'Add Note' page for Job Opening ID 994488. The page has a blue header with the title 'Add Note'. Below the header, the Job Opening ID is displayed as 994488. The main form area is titled 'Note' and contains the following fields:

- Note Date:** A date picker showing 08/18/2009 with a calendar icon.
- Audience:** A dropdown menu currently set to 'Private'.
- Subject:** A text input field.
- Notes:** A large text area for entering the note content, with a small icon in the top right corner.

At the bottom of the form, there are two buttons: 'Save & Return' and 'Cancel'.

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.
- *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 (on the Job Opening page: Activity & Attachments tab, click the Add Expense link).

Add Expenses

Job Opening ID: 994488

Add new Expense

*Expense Code:

*Expense Amount:

*Charge Date:

Business Unit: eBenefits Business Unit 1

Department: Eben Strategy Department

Applicant Name:

Description:

Add Expenses page

Job opening expenses are costs incurred for the job opening, such as costs of advertising or engaging an agency to handle the job opening. If the expense cannot be attributed to a specific applicant, use the Add Expenses page to tie the expense to the job opening.

| | |
|-----------------------|---|
| Expense Code | Select the expense code. |
| Expense Amount | Enter the amount of the expense. |
| Charge Date | Enter the date the expense was incurred. |
| Business Unit | Select the business unit. The default is the business unit associated to the job opening. |
| Department | Select the department. The default is the department associated to the job opening. |
| Applicant Name | Enter the applicant name. For job opening expenses, this should be blank. |
| Description | Enter a description of this expense. |

Reviewing Job Opening Details

Access the Job Opening page: Job Opening Details tab (click the Job Opening Details tab on the Job Opening page).

The page that appears is similar to the page that you use to create job openings. This is used to review the job opening when approvals is used.

See [Chapter 10, "Creating Job Openings," page 205](#) and [Chapter 7, "Setting Up Recruiting Templates," Understanding Job Opening Templates, page 131](#).

There are restrictions on who can update the job opening data:

- If the status of the job opening is *Draft*, only the creator of the job opening can update the information .
- Interviewers do not have access to Salary information.
- If status is *Hold, Cancelled, or Closed*, only Recruiting Administrators can update data.

Printing Job Openings

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

- Select sections to print.
- Preview and print job opening details.

Understanding Job Opening Printing

To print job opening information for a single selected job opening, click the Print Job Opening link that appears on many job-related pages in the system. Clicking this link generates a print-friendly consolidated view of the job opening sections that you choose to include.

When you select specific sections of information that you want to include in your printout, two types of sections are available:

- Sections that correspond to the layout of the Job Opening Details tab on the Job Opening page.

The layout of sections within the Job Opening Details tab comes from the job opening template. Templates define the layout in two levels: *pages*, which the system renders as links under the Job Opening Details tab, and *sections* on those pages, which the system renders as either groups of fields or grids.

All of the sections in the associated job opening template appear in the list of sections. However, sections that do not contain any data do not appear in the final printed document, even if you select that section as one you want to include.

For example, if the template includes a section for competencies, then competencies appears in the list of available sections. But if a specific job opening doesn't list any competencies, then the printout will not have a competencies section at all rather than having a blank section for competencies.

- Sections that correspond to the layout of the Activity & Attachments tab on the Job Opening page.

This is a static set of sections: Job History, Notes, Attachments, and Expenses.

Only those sections that have data are available for selection. For example, if the job opening doesn't have any attachments, then the attachments section does not appear in the list of sections. Additionally, the Notes section appears only if you have access to at least one note, as determined by the normal security for public and private notes.

Note. The job opening printout never includes any applicant data.

Pages Used to Print Job Openings

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|-------------------------------|------------------------|--|--|
| Select Job Opening Sections | HRS_JO_PRNT_SECT | Recruiting, Find Job Openings Click a job opening in the Search Results grid to access the Job Opening page. Click the Print Job Opening link on the Job Opening page. (This link also appears on many other job-related pages in the system.) | Select which sections of the job opening to include when printing. |
| Job Opening Printable Details | HRS_JO_PRINT_PAGE | Click the Preview Printable Details link on the Select Job Opening Sections page | Review and print the selected job opening data. |

Selecting Sections to Print



Access the Select Job Opening Sections page (click the Print Job Opening link on the Job Opening page).

Select Job Opening Sections

1. Select the sections of the job opening that you want to print.
2. Select the Preview Printable Details hyper link.

Job Opening ID: 35000 HRMS Analyst

[Select All](#) [Deselect All](#) [Preview Printable Details](#) [Return to Previous Page](#)

| Job Opening Print Selection | | Customize Find   1-24 of 24 Last |
|-------------------------------------|--|---|
| Select | Section to Print [PAGE.Section] | |
| <input checked="" type="checkbox"/> | JOB DETAILS.Job Information | |
| <input type="checkbox"/> | JOB DETAILS.Staffing Information | |
| <input checked="" type="checkbox"/> | JOB DETAILS.Salary Information | |
| <input checked="" type="checkbox"/> | QUALIFICATIONS.Education and Experience | |
| <input type="checkbox"/> | QUALIFICATIONS.Screening Question | |
| <input type="checkbox"/> | QUALIFICATIONS.Areas of Study | |
| <input checked="" type="checkbox"/> | QUALIFICATIONS.Competencies | |
| <input type="checkbox"/> | QUALIFICATIONS.Degrees | |
| <input type="checkbox"/> | QUALIFICATIONS.School Education | |
| <input type="checkbox"/> | QUALIFICATIONS.E&G Special Projects | |
| <input type="checkbox"/> | QUALIFICATIONS.Elements | |
| <input type="checkbox"/> | QUALIFICATIONS.Honors and Awards | |
| <input type="checkbox"/> | QUALIFICATIONS.Licenses & Certifications | |
| <input type="checkbox"/> | QUALIFICATIONS.Language Skills | |
| <input type="checkbox"/> | QUALIFICATIONS.Memberships | |

[Select All](#) [Deselect All](#) [View Job Opening Details](#) [Return to Previous Page](#)

Select Job Opening Sections page

Select

Select the check box for the sections that you want to include in your job opening printout. The Job Information section is always selected, even if you click the Deselect All link. This ensures that identifying information about the job opening always appears in your printout.

Section to Print

Displays a list of sections that are available for printing. The specific sections in the list depend on the job opening.

First, you see the sections that correspond to the job opening template that controls layout of the Job Opening Details tab. Sections appear in the order determined by the template. These section names use the format <PAGE>.<Section>. In terms of the layout on the Job Opening page, *PAGE* refers to the links directly under the Job Opening Details tab and *section* refers to the sections that appear when you click those links. For example, if the Qualifications link under the Job Details tab has a section for competencies, that section appears in the list as QUALIFICATIONS.Competencies.

Next, the grid lists the sections that correspond to the grids in the Activity & Attachments Tab on the Job Opening page. The grid lists these sections using the format OTHER.<Section>. For example, if the job opening has any notes (and you have access to at least one note), the grid includes a row for OTHER.Notes.

Preview Printable Details

Click this link to continue to the Job Opening Printable Details page, where you can preview and print the selected job opening data.

Previewing and Printing Job Opening Details

Access the Job Opening Printable Details page (click the Preview Printable Details link on the Select Job Opening Sections page).

Job Opening Details

[Return to Previous Page](#) [Print this Page](#)

▼ General Information

| | | |
|-------------------|--------------|--|
| Job Opening ID: | 35000 | |
| Job Opening Type: | Standard | |
| Posting Title: | HRMS Analyst | |
| Job Title: | Analyst-HRMS | |
| Job Family: | | |

▼ Job Information

| | | |
|----------------------|------------------|--------------------------------|
| Created By: | KU0007 | Betty Locherty |
| Created: | 09/13/2004 | |
| Openings to Fill: | Limited | |
| Target Openings: | 1 | |
| Available Openings: | 1 | |
| Establishment ID: | | |
| Business Unit: | GBIBU | Global Business Institute BU |
| Company: | GBI | Global Business Institute 9999 |
| Department: | 10000 | Human Resources |
| Status Code: | 010 Open | |
| Status Reason: | Re-Opened | |
| Status Date: | 09/13/2004 | |
| Desired Start Date: | | |
| Encumb Date: | | |
| Projected Fill Date: | | |
| Date Authorized: | 09/13/2004 | |
| Referral Program ID: | | |
| Recruitment Contact: | Jeffrey Frankens | |

▼ Recruiting Locations

| Recruiting Area | Location | Target Openings | Primary |
|-----------------|------------|-----------------|---------|
| 1220 | California | 1 | Yes |

▼ Positions

Job Opening Printable Details page

Note. This is a partial screen shot.

This page displays all of the selected job opening information in a consolidated format. Scroll to review all of the data that you chose to include.

Print this Page

Click this button to open a standard print dialog box and print the job opening. If you collapse any sections before printing, those sections appear collapsed on the final printout.

The final print output is further optimized for printing and thus differs from what you would get if you simply used your browser's print command. For example, the navigation links at the top of the page do not appear on the printout, and the section titles are rendered as dark text rather than as white text in a colored bar.

Chapter 18

Managing Job Postings

This chapter discusses how to:

- Build the job posting collections.
- Search for job postings.
- Manage external job postings.
- Post job opening to PeopleSoft Services Procurement

Building the Job Posting Collections

This section provides an overview of the job posting collections and discusses how to build them.

Understanding the Job Posting Collections

Run the Verity Job Posting Index Build (HRS_JSCH_IDX) Application Engine process to build the search collections that applicants and recruiting users use to search for job postings. Because job openings and job postings are always being added to the system, you must continually build the collections to keep them up to date.

The Verity Job Posting Index Build process creates two collections:

- The job posting collection.
- The job opening profile collection.

The Job Posting Collection

The job posting collection includes job opening and posting data, and it contains job profile items as text (for example *CIRM Integrated Resource Management* within the content section *LIC* (licenses)).

The job posting collection is used by searches on these pages:

- The Job Search page in Candidate Gateway, where applicants search for job postings that interest them.

Applicants can use either a basic search (a simple keyword search) or an advanced search that enables them to add specific search criteria such as their desired pay.

See *PeopleSoft Enterprise Candidate Gateway 9.1 PeopleBook*, "Using Candidate Gateway," Reviewing and Searching for Job Postings.

- The Search Postings – Basic Search page, which Talent Acquisition Manager users use to manage job postings.

See [Chapter 18, "Managing Job Postings," Searching for Job Postings, page 544.](#)

The Job Opening Profile Collection

The job opening profile collection contains job opening profile data (such as competencies). It contains codes within a dynamically generated nested structure representing different profile attributes: for example, *N* within the item property *JPM_YN_2* within the content item *ITEM_CIRM* within the content section *SECTION_LIC*.

The system uses this collection when performing searches that compare profiles. Profile match searching is available on these pages:

- Internal applicants use the Job Openings That Match Your Profiles page in Candidate Gateway to search for job openings that match one of the employees' own person, job, or interest profiles.

Profile searching is *not* available to external applicants.

See [PeopleSoft Enterprise Candidate Gateway 9.1 PeopleBook, "Using Candidate Gateway," Performing a Profile Search.](#)

- Recruiters use the Recruitment Profile Match page to match profiles of various types, including job opening profiles.

For example, recruiters can search for employees or applicants with profiles that match a job opening profile, or they can search for job postings that match a particular applicant or employee profile.

See [Chapter 12, "Searching for Applicants," Performing Profile Searches, page 363.](#)

Note. The Verity Job Posting Index Build process creates this collection only if profile utilization is active (on the Recruiting Installation - General page, the Allow Profile Utilization field value is *Yes*.)

Job Openings That Are Indexed

Although the data in these collections comes from the entire job opening rather than from just the job posting, these collections are considered called the job posting collections because they include only data from posted job openings.

The job posting collections includes only job openings that:

- Have an open status.
- Have been posted internally or externally to a destination that is a Company recruitment source type.

If the posting includes a posting date, it is considered to be posted only on or after that date.

See [Chapter 8, "Setting Up Recruitment Sources and Third Party Integrations," Setting Up Recruitment Sources, page 181](#) and [Chapter 10, "Creating Job Openings," Creating Job Postings, page 277.](#)

Page Used to Build the Job Posting Collections

| Page Name | Definition Name | Navigation | Usage |
|-----------------|--------------------|--|---|
| Build Job Index | HRS_JSRCH_RUN_PROC | Recruiting, Administration, Build Job Index, Build Job Index | Build the job posting collection and the job opening profile collection by running the Verity Job Posting Index Build (HRS_JSCH_IDX) Application Engine process. Note. The job opening profile collection is created only if profile utilization is active. |

Building the Job Posting Collections

Access the Build Job Index page (Recruiting, Administration, Build Job Index, Build Job Index).

Build Job Index page

Create New

Select this option to build new collections. The new collections includes job openings that have been opened or since the date that you enter in the Open Date From field.

Update Existing

Select this option to add, update, and delete entries in the existing collections.

Open Date From

When the system builds or updates the job posting collections, it includes job openings that were opened on or since the date you enter in this field. If you leave this field blank, the collection includes all job openings that:

- Have an open status.
- Have been posted internally or externally to a destination that is a Company recruitment source type.

If the posting includes a posting date, it is considered to be posted only on or after that date.

Searching for Job Postings

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

- Perform basic job posting searches.
- Perform advanced keyword searches.

Note. This section does not discuss profile match searches (searching for job opening profiles that match other types of profiles) or the additional collections that you need to build to perform these searches. Profile match searches are part of the Find Applicants component.

See [Chapter 12, "Searching for Applicants," Performing Profile Searches, page 363.](#)

Understanding Job Posting Searches

To search for job postings, use the Search Postings - Basic Search or the Advanced Keyword Search pages. Use these pages to find open job postings whose job posting titles or descriptions match the criteria you entered.

Job posting searches are only as current as the data in the search collections. Since job openings are continually being added to the database, you must frequently build the job collections to keep them current.

Prerequisites

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

See [Chapter 18, "Managing Job Postings," Building the Job Posting Collections, page 541.](#)

Pages Used to Search for Job Postings

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|--------------------------------|------------------------|--|--|
| Search Postings - Basic Search | HRS_REC_SCHJOB | Recruiting, Postings, Search Postings, Basic Search | Define basic criteria for job posting searches. |
| Advanced Keyword Search | HRS_REC_SCHJOB | Click the Advanced Search link on the Search Postings - Basic Search page. | Define additional criteria for job posting searches. |
| View Job Posting | HRS_REC_JBPST | Click the posting title link in the Search Results group box on the Search Postings - Basic Search page. | View job posting details. |

Performing Basic Job Posting Searches

Access the Search Postings - Basic Search page (Recruiting, Postings, Search Postings, Basic Search).

Basic Search

▼ View Basic Search criteria

Search For: Posted Within:

[Advanced Search](#)
[Search Tips](#)

✓ 2 Results Found

Search Results

| &Result | Customize Find View All First 1-2 of 2 Last | | | |
|---|---|------|----------|----------------|
| Posting Title | Job ID | Type | Location | Hiring Manager |
| Customer Representative | 30016 | E | Oklahoma | Patrick Seto |
| Customer Representative | 30016 | I | Oklahoma | Patrick Seto |

[Manage Job Postings](#)

Search Postings - Basic Search page

Keyword Search

Search For

Enter the words that you want to search for in the job postings. These words are compared to the job posting title and description.

Posted Within

Select the time period to search. Only job postings that were posted during the specified time period are included in your search results.

Options are:

- *Anytime*
- *Last Week*
- *Last Month*
- *Last Three Months*
- *Last Year*

Search Results

| | |
|-----------------------|---|
| Posting Title | Click link to access the View Job Posting Details page. |
| Job Opening ID | Click link to access the Job Opening page. |

Defining Advanced Keyword Searches

Access the Advanced Keyword Search page (on the Search Postings - Basic Search page, click the Advanced Search link).

Advanced Keyword Search

Enter Advanced Search Criteria

Search
Reset Search
[Basic Search](#)
[Search Tips](#)

Enter Keywords:

Job Family:

Posted Within: ▼

Recruiting Location:

Country: ▼

Full/Part Time: ▼

Regular/Temporary: ▼

Desired Annual Pay:

Search
Reset Search
[Basic Search](#)
[Search Tips](#)

[Manage Job Postings](#)

Advanced Keyword Search page

| | |
|-----------------------|--|
| Enter Keywords | Enter the words that you want to search for in the job posting. These words are compared to the job posting title and description. |
| Job Family | Select a job family. |

| | |
|----------------------------|--|
| Posted Within | Select the time period to search. Only job postings that were posted during the specified time period are included in your search results. Options are: <ul style="list-style-type: none">• <i>Anytime</i>• <i>Last Week</i>• <i>Last Month</i>• <i>Last Three Months</i>• <i>Last Year</i> |
| 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

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|--|------------------------|---|---|
| Manage External Postings | HRS_EP_STATUS | Recruiting, Postings, Manage External Postings, Manage External Postings | Post, update, and unpost external job postings. Also, review history of postings. |
| External Posting History | HRS_EP_HISTORY | Select <i>History</i> from the Action column in the Search Results group box on the Manage External Postings page. | Review external job posting transactions history. |
| Open Integration Framework - Integration Log | HRS_HROI_LOG | Set Up HRMS, Product Specific, Recruiting, Integration, Integration Log, Open Integration Framework - Integration Log | Review the transactions. |

Posting, Updating, and Unposting External Job Postings

Access the Manage External Postings page (Recruiting, Postings, Manage External Postings, Manage External Postings).

Job Boards

Manage External Postings

▼ Search

Job Opening:

Status:

Source:

Date Type:

Start Date:

End Date:

Data changed since last update

Search Results Customize | Find | | First 1-3 of 3 Last

| Select | Job Opening | Source | Status | Post Date | Remove Date | Changed | Action |
|--------------------------|---|----------------------|--------|------------|-------------|---------|--|
| <input type="checkbox"/> | Analyst-Business-30005 | Services Procurement | New | 05/12/2004 | | Yes | <input type="text"/> <input type="button" value="Go"/> |
| <input type="checkbox"/> | Contingent Analyst-Business-30005 | Services Procurement | New | 07/01/2004 | | Yes | <input type="text"/> <input type="button" value="Go"/> |
| <input type="checkbox"/> | Administrator-120010-503711 | Services Procurement | New | 08/19/2009 | | Yes | <input type="text"/> <input type="button" value="Go"/> |

Group Action:

Manage External Postings page

Search Results

Posting Title

Click the posting title link to access the Job Opening page.

Action

Select the action that you want to send to the destination source and then click Go. Options are:

- *History*: Select to access the External Posting History page, where you can review the transactions history for the external job posting.
- *Post*: Sends the post request message. The status of the corresponding job is updated to Unconfirmed Post until the destination responds.
- *Update*: As time goes by, the information associated to posted job openings may change. For example, perhaps the number of openings has increased or decreased. The job board where these jobs are posted are not automatically updated. The update action sends the update request message that will update the job board with the latest posting information. The status of the corresponding posting is not changed.
- *Unpost*: Sends the unpost request message. The status of the corresponding posting is changed to *Unconfirmed Unpost* until the job board responds.

Reviewing External Job Posting Transaction History

Access the page External Posting History page (on the Manage External Postings page, select *History* from the Action column in the Search Results group box).

Job Boards

External Posting History

Job Opening ID: 503710
Posting Title: JOB - 170030
Source: MOIN TAM_SPro Integration
Status: Unconfirmed Post
Post Date: 08/18/2009
Remove Date:

| Transactions | | | | |
|------------------|------------|-------------|--------------------|---------------------------------|
| Transaction Name | Result | Description | Last Updated | Integration Log |
| JobBoardPost | Redirected | | 08/19/2009 12:21PM | Integration Log |
| JobBoardPost | Redirected | | 08/19/2009 4:20PM | Integration Log |
| JobBoardPost | Redirected | | 08/19/2009 4:21PM | Integration Log |
| JobBoardPost | Redirected | | 08/19/2009 4:27PM | Integration Log |

Action:

External Posting History page

Transactions

Transaction Name Displays the incoming or outgoing message.

Action Displays the results of the message.

Description Displays a description of the action.

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

Integration Log

Click this link to access the Open Integration Framework - Integration Log page, where you can view detailed information about the transaction

Reviewing the Integration Log

Access the Open Integration Framework - Integration Log page (Set Up HRMS, Product Specific, Recruiting, Integration, Integration Log, Open Integration Framework - Integration Log).

Open Integration Framework

Integration Log

▼ Search Integration Log

Status:

Vendor:

Transaction ID:

Last Updated From: To:

Search Results Customize | Find | View All | First 1 of 1 Last

| Transaction | Transaction Type | Vendor | Last Updated | Status |
|------------------------------|------------------|-----------------------------|--------------------|-----------|
| JobBoardPost | OutSync | MOIN - TAM_SPro Integration | 08/19/2009 12:21PM | Succeeded |

[Return](#)

Open Integration Framework - Integration Log page

The system displays a list of all open integration framework transactions. In the search results, a link in the Transaction column enables you to view the actual XML that is generated by the transaction.

Posting Jobs to PeopleSoft Services Procurement

This section provides an overview of integration with PeopleSoft Services Procurement and discusses how to post jobs to PeopleSoft Services Procurement.

Note. The *PeopleSoft Enterprise Services Procurement PeopleBook* provides the technical details of the integration between Talent Acquisition Manager and PeopleSoft Services Procurement. This section focuses on the business process flow for using PeopleSoft Services Procurement to fill job openings.

Understanding Integration With PeopleSoft Services Procurement

Oracle delivers prebuilt integration points that enable you to:

- Use PeopleSoft Services Procurement to search for contingent workers to fill job openings in Talent Acquisition Manager.
- Use PeopleSoft Human Resources as your system of record for contingent workers who are brought in to fill PeopleSoft Services Procurement requisitions.

Note. The use of PeopleSoft Human Resources as your system of record for PeopleSoft Services Procurement contingent workers is available regardless of whether you use PeopleSoft Services Procurement to fill Talent Acquisition Manager job openings. This section, however, discusses the integration that occurs when you use all three systems.

Integration Process Flow

When you integrate with PeopleSoft Services Procurement, you set up Services Procurement as a posting destination for job openings. Posting a job to Services Procurement initiates this sequence:

1. Talent Acquisition Manager sends the posting data to Services Procurement.
2. Services Procurement uses this data to create a corresponding requisition.
3. When Services Procurement identifies a candidate for the requisition, the candidate information is sent to Talent Acquisition Manager.
4. Talent Acquisition Manager creates an applicant record.

Note. If PeopleSoft Services Procurement previously sent the same candidate to Talent Acquisition Manager, then Talent Acquisition Manager is able to match the candidate information to the existing applicant record. Talent Acquisition Manager does not, however, attempt to match new candidate data to existing applicant records.

5. Talent Acquisition Manager links the candidate's applicant record to the job opening.

The initial disposition for the newly linked applicant is *Offer Accepted*, however, there is no actual offer associated with the applicant. This default disposition ensures that the applicant is ready for hire processing.

When the applicant is linked to a job opening, Talent Acquisition Manager also notifies the recruiter of the newly linked applicant. This notification is in addition to any status change notifications that are active in the system.

6. If the Services Procurement candidate is selected, the recruiter initiates the prepare for hire process in Talent Acquisition Manager.

If a different applicant is hired, the Services Procurement candidate's disposition changes according to the status change rules (for example, to *Reject - Another Applicant Was Hired*), and the system sends a message to Services Procurement cancelling the work order.

7. PeopleSoft Human Resources receives a hire request from Talent Acquisition Manager, and the HR user completes the hiring process.

If the applicant is withdrawn from hire (using the *Withdraw from Hire* action in Talent Acquisition Manager), Talent Acquisition Manager sends a Services Procurement indicating that the candidate has been withdrawn and that Services Procurement can cancel the work order.

8. When the hire process is complete, PeopleSoft Human Resources sends employee data (such as the employee ID and record number) back to Talent Acquisition Manger.
9. Talent Acquisition Manager, in turn, sends the employee data to Services Procurement.

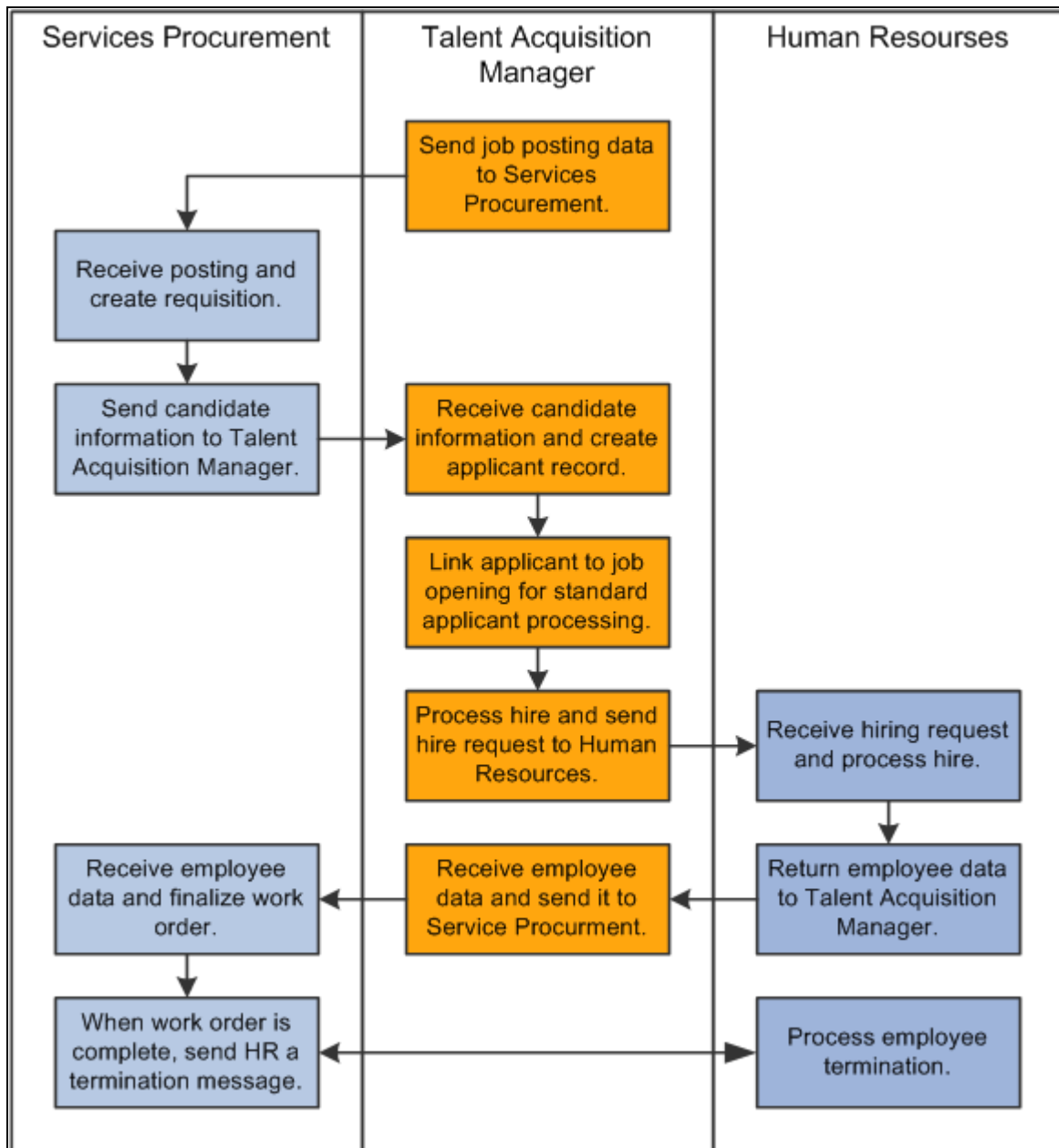
Note. When Services Procurement receives the employee data, it sends a request to Human Resources to create a user profile for the new candidate, and Human Resources processes the request and creates the user profile. This occurs because the Human Resources system is considered the master in this integration, and all user profiles must be created in Human Resources and synched to Services Procurement, which requires applicants to have a user profile so that they can sign into Services Procurement to enter time sheets.

10. Services Procurement uses this information to update the work order and to associate the HR employee data with the Service Procurement candidate record.

Having the HR employee data enables Services Procurement to communicate directly with Human Resources when it's time to terminate the employee.

11. When the service provider has completed the project and the work order is closed, terminated, or cancelled, Services Procurement sends a terminate message directly to PeopleSoft Human Resources

The following diagram illustrates these steps:



Process flow for integration with PeopleSoft Services Procurement

Data Sent to Services Procurement

When you post a job to PeopleSoft Services Procurement, the message that Talent Acquisition Manager sends to Services Procurement includes (but is not limited to) these data elements:

- A job posting ID that is used as the unique identifier.
In the Services Procurement system, this ID goes into a field whose name suggests that this is the job opening ID, but it is not the job opening ID.
- The beginning date and ending date of the posting.
- The job family, which is equivalent to the *service type* in PeopleSoft Services Procurement.

- The job code, which is equivalent to the *service* in PeopleSoft Services Procurement.
- The pay frequency for the job openings, which is equivalent to the *unit of measure* in PeopleSoft Services Procurement.

Although this is not a required field in Talent Acquisition Manager, it is required for jobs that are posted to PeopleSoft Services Procurement. If the pay frequency is missing when a user attempts to post the job, the system displays an error.

- The subset of job qualifications (such as competencies and experience) for which there are data mappings to the Services Procurement system.
- The user ID of the person who posted the job.

This user ID *must* also exist in PeopleSoft Services Procurement. This user ID is used to create and immediately display the Services Procurement work order when a job is posted.

Posting Jobs to PeopleSoft Services Procurement.

To post a job to PeopleSoft Services Procurement:

1. On the Job Opening page: Job Details tab: Job Postings section, create a job posting and select *Services Procurement* as the posting destination.

See [Chapter 10, "Creating Job Openings," Adding Job Posting Details, page 279.](#)

2. On the Manage External Job Postings page, select the *Post* action for the posting, then click the Go button to send the posting message.

The system processes the message and immediately opens the Create Requisition page in PeopleSoft Services Procurement.

See [Chapter 18, "Managing Job Postings," Managing External Job Postings, page 548.](#)

3. Review and, if necessary, modify the requisition then submit it.

The recruiting user is responsible for submitting the Services Procurement requisition and therefore must be a user of both systems.

Once the requisition is submitted, the PeopleSoft Services Procurement fulfillment process begins.

See *PeopleSoft Enterprise Services Procurement PeopleBook*

Chapter 19

Managing Applicants

This chapter provides an overview of applicant management and discusses how to:

- Track applicant activity.
- Manage contact notes.
- Review applicant data.
- Link applicants to job openings.
- Print application details.
- Send correspondence and recruitment letters.
- Forward applicants.
- Reject applicants.
- Change applicant statuses.
- Manage applicant lists.
- Create applicant checklists.
- Add persons of interest.
- Process duplicate applicants.
- Use the job search agent.
- Generate recruitment reports.

Understanding Applicant Management

There are different mechanisms for performing different types of applicant management tasks. This section briefly describes the following mechanisms and the tasks for which they are used:

- The Manage Applicant page.
- Actions in the Take Action field
- Processes and reports.

The Manage Applicant Page

The Manage Applicant page provides a central location for reviewing applicant data and performing applicant-related tasks. For the most part, the page summarizes data and provides links to other pages where users can add or update the data, but there are a few sections on the page where users enter data directly.

The Manage Applicant page has three tabs, two of which are divided into subsections for different types of data. The tabs are:

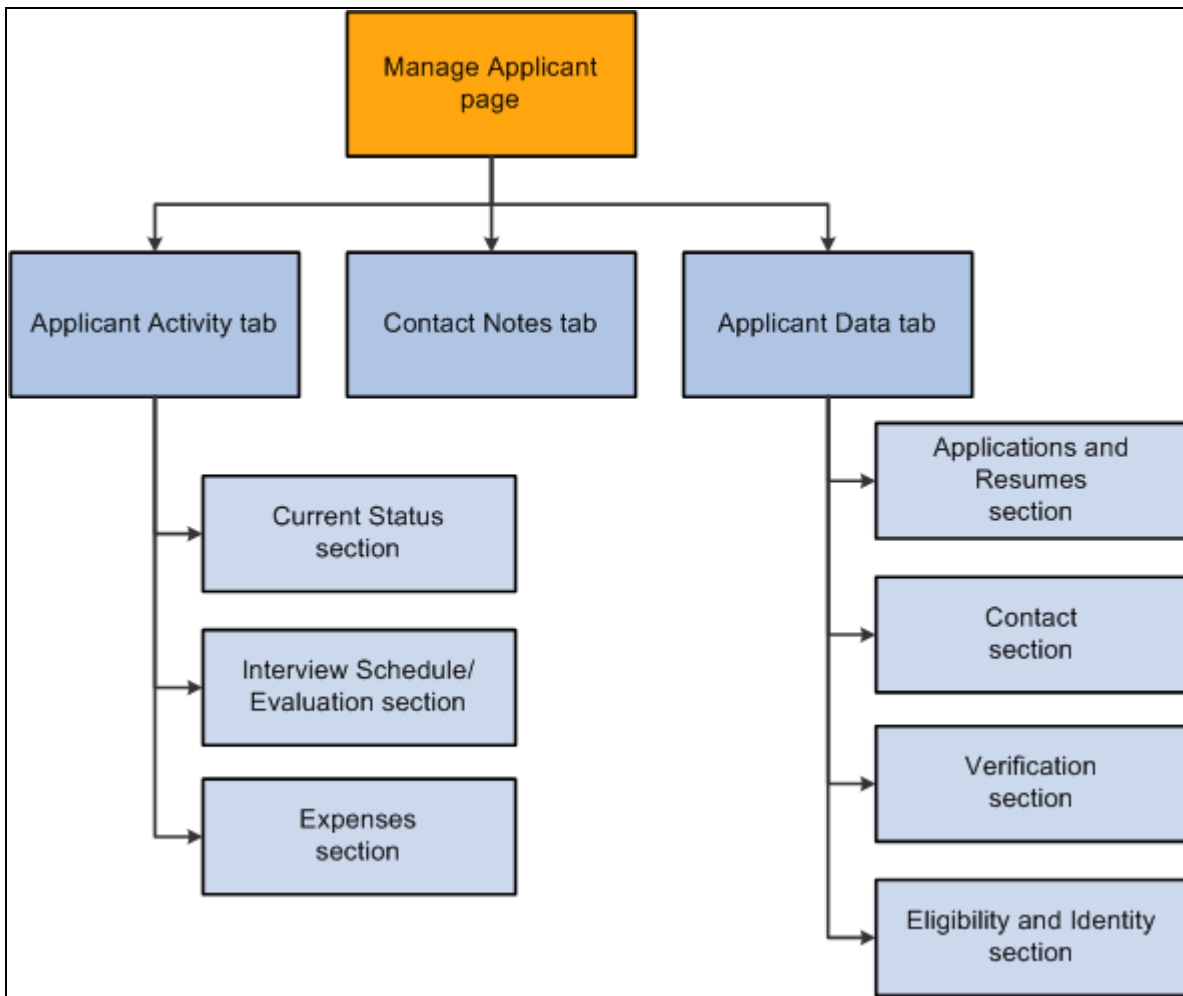
- Applicant Activity tab.
 - The *Current Data* section summarizes the applicant's disposition for each job to which the applicant is linked. If the applicant applied without selecting a job, there is a row of data to track that disposition as well. Links in this section provide access to the disposition details and to job opening information.
 - The *Interview Schedule/Evaluation* section summarizes interview activity for the applicant. Links in this section provide access to the Schedule Interview component where users create and update interviews.
 - The *Expenses* section summarizes applicant-related expenses. Links in this section enable you to create expense records and view expense details.

- Contact Notes tab.

This tab summarizes interactions with the applicant by showing a contact note for each interaction. Contact notes can be system-generated or manually created. Links on this tab enable you to add contact notes and view note details. An additional grid on this page enables you to identify interested parties so that they can be easily copied on email correspondence.

- Applicant Data tab.
 - The *Applications and Resumes* section summarizes the applications that the applicant has submitted. Links in this section enable you to view the complete application details and to add new applications.
 - The *Contact* section contains name, address, email, phone, and status information for the applicant. Users update these fields directly on the Manage Applicant page.
 - The *Verification* section summarizes the applicant's references. Links in this section enable you to add references and view reference details.
 - The *Eligibility & Identity* section contains both general and country-specific personal information, work eligibility information (such as citizenship), bank account information, and disability-related information. Users update these fields directly on the Manage Applicant page.

This diagram illustrates the hierarchical structure of the tabs and sections on the Manage Applicant page:



Information hierarchy on the Manage Applicants page

Actions in the Take Action Field

Talent Acquisition Manager provides many predefined recruiting tasks that you perform by selecting an action from the Take Action fields or Group Action fields that appear on several pages, including the Manage Applicant page.

Pages Where Actions are Available

Recruiting actions can be associated with either the overall applicant record or with a specific job application; the association determines which actions are available. For example, the action that prepares a job offer is only available for a specific job application, while the actions that merge duplicate applicant records are available only for the overall applicant. For convenience, some actions that apply to the overall applicant also available at the job application level.

Here is where you find action fields that are associated with specific job applications:

- The Find Applicant page: Search Results grid.
- The Manage Applicant page: Applicant Activity tab: Current Status section: Applicant Activity grid.

- The Job Opening page: Manage Applicants tab: View Applicants section: Manage Applicants grid.

Here is where you find action fields that are associated with the overall applicant record:

- The header of the Manage Applicant page.
- The Applicant List page.

Individual Actions Vs. Group Actions

In grids, the Take Action field appears in each row so that you can act on an individual row of data. The system initiates the selected action as soon as it is selected (that is, there is not a separate step for initiating the selected action).

If you were to use the keyboard up and down arrows to scroll through items in the drop-down list, the system would initiate the first action that you reached and render it impossible to scroll further to perform other actions. Therefore, to use the keyboard to perform actions on individual rows, users must first press the Alt-Down Arrow keyboard combination to open the drop-down list, use the up and down arrows to scroll through the values in the list, then press the Enter key to select the action and initiate the action.

Some grids also offer a Group Action field that appears below the grid and enables you to act on multiple rows of data at once. You first select the grid rows that you want to include, then you select the action in the Group Action field, and finally you click the Go button to initiate the action. Because the system does not initiate the action until you press the Go button, keyboard users do not have to perform any extra steps before using the arrow keys to scroll through items in the drop-down list box.

The Group Action field generally lists a subset of the actions that are available to perform on individual rows.

Group actions area available in these locations:

- The Find Applicant page: Search Results grid.
- The Manage Applicant page: Applicant Activity tab: Current Status section: Applicant Activity grid.
- The Applicant List page.

The Applicant List page is unique in that it has a field for performing group actions, but it does not have a Take Action field in each row of the grid that lists applicants. To act on a single row, select only the one row before initiating the group action.

Summary of Action Availability

The following table lists the actions that you use to manage applicants. For each page where you can perform actions, the table indicates whether you can perform the action on one row of data (using the Take Action field) or many (using the Group Action field).

Note. Group actions are not available on the Manage Applicant page. Actions performed at the header level apply to the overall applicant record, while actions performed in the Applicant Activity grid apply to the specific job application.

| Action | Manage Applicant Page: Header Level | Manage Applicant Page: Applicant Activity Grid | Find Applicants Page: Search Results Grid | Job Opening Page: Manage Applicants Grid | Applicant List page | Reference |
|------------------------------------|--|---|--|---|----------------------------|---|
| <i>Add Applicant to New List</i> | One row only | Not available | One or many rows | One or many rows | Not available | See Chapter 19, "Managing Applicants," Managing Applicant Lists, page 609 . |
| <i>Add Applicant to Saved List</i> | One row only | Not available | One or many rows | One or many rows | Not available | See Chapter 19, "Managing Applicants," Managing Applicant Lists, page 609 . |
| <i>Add Note</i> | Not available | Not available | Not available | Not available | Many rows. | See Chapter 19, "Managing Applicants," Managing Contact Notes, page 575. |
| <i>Add Person of Interest</i> | One row only Note. Applicant must be an external applicant. | Not available | Not available | Not available | Not available | See Chapter 19, "Managing Applicants," Adding Persons of Interest, page 618. |
| <i>Add to Another List</i> | Not available | Not available | Not available | Not available | Many rows. | See Chapter 19, "Managing Applicants," Adding Applicants to an Existing List, page 616. |
| <i>Change Applicant Status</i> | One row only | Not available | One or many rows | One or many rows | Not available | See Chapter 19, "Managing Applicants," Changing Applicant Statuses, page 608. |

| Action | Manage Applicant Page: Header Level | Manage Applicant Page: Applicant Activity Grid | Find Applicants Page: Search Results Grid | Job Opening Page: Manage Applicants Grid | Applicant List page | Reference |
|---------------------------------------|--|---|--|---|----------------------------|--|
| <i>Copy Applicant To Employee</i> | Not available | One row only | One row only | One row only | Not available | See Chapter 16, "Hiring Applicants." (AUS) Copying Salary Packages to Human Resources. page 515. |
| <i>Create Interview Evaluation(s)</i> | Not available | One row only | One row only | One or many rows | Not available | See Chapter 14, "Interviewing Applicants." Completing Interview Evaluations. page 448. |
| <i>Create New List</i> | Not available | Not available | Not available | Not available | Many rows. | See Chapter 19, "Managing Applicants." Creating Applicant Lists. page 612 |
| <i>Create Salary Package Model</i> | Not available | One row only | One row only | One row only | Not available | See Chapter 16, "Hiring Applicants." (AUS) Creating Salary Packages. page 504. |
| <i>Edit Application</i> | Not available | Not available | Not available | Available only as group action | Not available | See Chapter 17, "Managing Job Openings." Reviewing Applicants Linked to Job Openings. page 527. |

| Action | Manage Applicant Page: Header Level | Manage Applicant Page: Applicant Activity Grid | Find Applicants Page: Search Results Grid | Job Opening Page: Manage Applicants Grid | Applicant List page | Reference |
|--------------------------------------|--|---|--|---|----------------------------|--|
| <i>Forward Applicant</i> | One row only | Not available | One or many rows | One or many rows | Many rows. | See Chapter 19, "Managing Applicants," Forwarding Applicants, page 602. |
| <i>Link Applicant to Job</i> | One row only | Not available | One or many rows | One or many rows | Many rows. | See Chapter 19, "Managing Applicants," Linking Applicants to Job Openings, page 585. |
| <i>Manage Applicant Checklist(s)</i> | Not available | One row only | One row only | One row only | Not available | See Chapter 19, "Managing Applicants," Creating Applicant Checklists, page 616. |
| <i>Manage Applicant Contracts</i> | One row only | Not available | Not available | Not available | Not available | See Chapter 16, "Hiring Applicants," Creating Applicant Contracts, page 498. |
| <i>Manage Interviews</i> | Not available | One row only | One or many rows | One or many rows | Not available | See Chapter 14, "Interviewing Applicants," Scheduling Interviews, page 425. |
| <i>Merge as Source</i> | One row only | Not available | Not available | Not available | Not available | See Chapter 19, "Managing Applicants," Manually Merging Applicants from the Source Record, page 631. |

| Action | Manage Applicant Page: Header Level | Manage Applicant Page: Applicant Activity Grid | Find Applicants Page: Search Results Grid | Job Opening Page: Manage Applicants Grid | Applicant List page | Reference |
|----------------------------------|--|---|--|---|----------------------------|--|
| <i>Merge as Target</i> | One row only | Not available | Not available | Not available | Not available | See Chapter 19, "Managing Applicants," Manually Merging Applicants from the Target Record, page 630. |
| <i>Pre-Employment Check</i> | One row only | Not available | Not available | One row only | Not available | See Chapter 16, "Hiring Applicants," Completing Pre-Employment Checks, page 495. |
| <i>Prepare for Hire</i> | Not available | One row only | One row only | One row only | Not available | See Chapter 16, "Hiring Applicants," Hiring Applicants, page 504. |
| <i>Prepare Job Offer</i> | Not available | One row only | One row only | One row only | Not available | See Chapter 15, "Making Job Offers," Creating Job Offers, page 469. |
| <i>Print Application Details</i> | Not available | One row only | One or many rows | One or many rows | Not available | See Chapter 19, "Managing Applicants," Printing Application Details, page 588. |
| <i>Reject Applicant</i> | Not available | One row only | One or many rows | One or many rows | Not available | See Chapter 19, "Managing Applicants," Rejecting Applicants, page 607. |

| Action | Manage Applicant Page: Header Level | Manage Applicant Page: Applicant Activity Grid | Find Applicants Page: Search Results Grid | Job Opening Page: Manage Applicants Grid | Applicant List page | Reference |
|----------------------------|--|---|--|--|----------------------------|--|
| <i>Route Applicant</i> | Not available | One row only | One or many rows | One or many rows | Many rows. | See Chapter 13, "Screening and Routing Applicants," Routing Applicants, page 417. |
| <i>Send Correspondence</i> | One row only | Not available | One or many rows | One or many rows | Many rows. | See Chapter 19, "Managing Applicants," Sending Correspondence and Recruitment Letters, page 591. |
| <i>Withdraw From Hire</i> | Not available | Not available | Not available | One row only Note. Valid only when the disposition is <i>Ready to Hire</i> and the job opening, if any, is in an <i>Open</i> status. | Not available | See Chapter 16, "Hiring Applicants," Withdrawing a Hire Request, page 515. |

One additional action, *Invite Application*, is available from the Recruitment Profile Match page when you search for employees with profiles that match a particular job opening's profile. When you invoke this action, the system sends the employee an email invitation to apply for the job opening.

See [Chapter 12, "Searching for Applicants," Performing Profile Searches, page 363.](#)

Processes and Reports

To run a process or report, navigate to the appropriate run control page, enter any necessary parameters, and submit the process or report to the Process Scheduler.

Use this mechanism to perform these tasks:

- Identify and merge duplicate applicants.
- Run the job search agent.

This process notifies applicants of job openings that meet their specified criteria.

- Generate recruiting reports.

See Also

[Chapter 19, "Managing Applicants," Processing Duplicate Applicants, page 620](#)

[Chapter 19, "Managing Applicants," Using the Job Search Agent, page 631](#)

[Chapter 19, "Managing Applicants," Generating Applicant Reports, page 633](#)

Tracking Applicant Activity

You track an applicant's activity using the Manage Applicant page: Applicant Activity tab: Current Status section, which shows the applicant is in the recruitment process for each associated job opening.

This section provides an overview how to track selectees for Japan, and discusses how to:

- Review applicant dispositions.
- Review disposition details.
- Review interview schedules and evaluations.
- Review applicant expenses.
- Add applicant expenses.

(JPN) Understanding How to Track Selectees for Japan

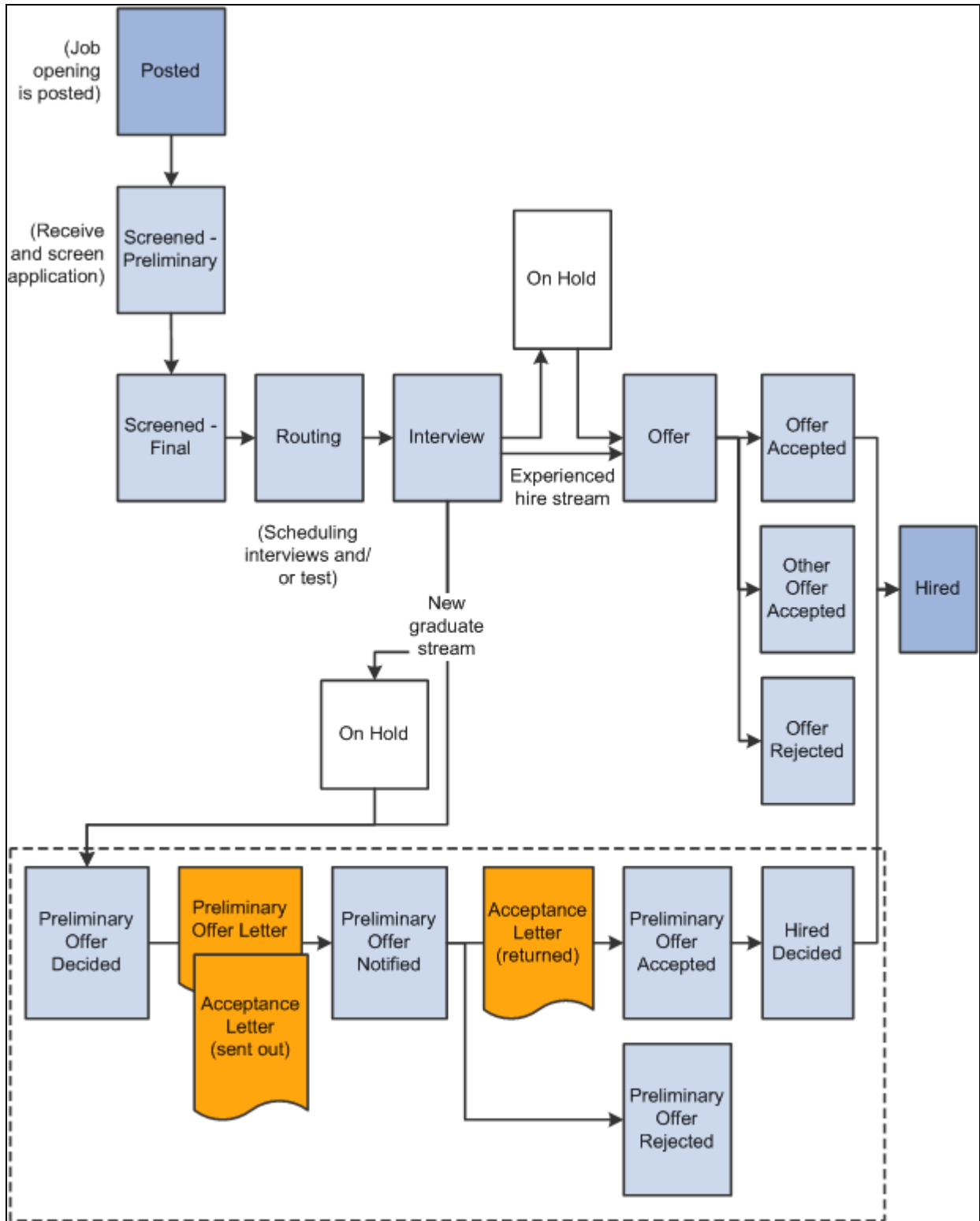
The standard PeopleSoft recruitment process begins with posting job openings and ends with hiring, when applicants become employees. In between job opening posting and hiring, there are the other recruitment activities, such as screening, interviewing, and offering and accepting employment.

The recruitment process followed by most Japanese companies, however, uses *selectee* dispositions between applicant and employee when processing new graduates. The new graduates become known as selectees when they have one of these four user-maintained dispositions related to preliminary offers:

- Preliminary offer decided.
- Preliminary offer notified.
- Preliminary offer accepted.
- Preliminary offer rejected.

Hire Decided is a fifth user-maintained disposition; when it is applied, the applicant is no longer considered a selectee. You manually enter the Hire Decided disposition when an applicant who has accepted a preliminary offer is about to be hired. The disposition of Preliminary Offer Accepted remains until that decision is made because it is possible that an applicant who has accepted might not in fact graduate and may not, therefore, be hired. The Hire Decided disposition distinguishes between those who have accepted and *might* be hired and those who have accepted and *will* be hired.

This flowchart illustrates the common additional Japanese recruitment stages for preliminary offers within the context of the standard recruitment process. The flowchart represents an organization that includes an acceptance letter with its version of a preliminary offer letter for the selectee to use when responding:



Japanese recruitment stages for preliminary offers within the overall recruitment flow

Pages Used to Track Applicant Activity



| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|--|------------------------|---|---|
| Manage Applicant page: Applicant Activity tab | HRS_MANAGE_APP | Recruiting, Find Applicants, Find Applicants Click an applicant name link in the Search Results grid on the Find Applicants page. | Review applicant recruitment data and perform various applicant related tasks. |
| Disposition Details | HRS_APP_RCMNT | Click the link in the Disposition column in the Search Results grid on the Find Applicant page or on the Manage Applicant page: Applicant Activity tab: Current Status grid. | Edit disposition details. The options on this page vary depending on the applicant's disposition. |
| Applicant Resume | HRS_APP_RESUME | <ul style="list-style-type: none"> Click the Resume icon on the Manage Applicant page: Applicant Activity tab: Current Status section. Click the Resume icon in the Applicants grid on the Manage Applicant page: Applicant Activity tab: Current Status section. | View an applicant's resume. |
| Add Expenses | HRS_APP_EXP_SP | Click the Add New Expense link or the Expense Details link on the Manage Applicant page: Applicant Activity tab: Expenses section. | Enter applicant expenses. |

Reviewing Applicant Dispositions

Access the Manage Applicant page: Applicant Activity tab: Current Status section (on the Find Applicants page, click an applicant name link in the Search Results grid).





Manage Applicant: Bob Montana

Name: [Bob Montana](#) **Applicant Type:** External Applicant
Applicant ID: 1027 **POI Type:**
Contact: EMail **Status:** 010 Active
Phone: 925/555-1212 **Address:** 678 Oakdale Drive
Email: HCMGENUser1@ap6023fems.us.oracle.com Pleasanton, CA 94588



Take Action:
[Previous Applicant](#) | [Next Applicant](#) | [Applicant List](#)

Applicant Activity
Contact Notes
Applicant Data

Current Status [Interview Schedule/Evaluation](#) [Expenses](#)

| Applicant Activity | | | | |
|---|-------------------------------|-----------------------|---|---|
| Job Opening | Disposition | Last Updated | Resume | *Take Action |
| HRIS Specialist - 30017 | 060 Interview | 09/14/2004 11:48AM |  | <input type="text" value="Select Action..."/> |
| Manager-Compensation/Benefits - 30023 | 020 Applied | 09/01/2004 12:00AM |  | <input type="text" value="Select Action..."/> |
| Staff Analyst - 30019 | 020 Applied | 09/01/2004 12:00AM |  | <input type="text" value="Select Action..."/> |
| Senior Financial Analyst - 30018 | 020 Applied | 09/01/2004 12:00AM |  | <input type="text" value="Select Action..."/> |

Manage Applicant page: Applicant Activity tab: Current Status section

When you initially access the Manage Applicant page, the Applicant Activity tab is active. Click the Contact Notes tab or the Applicant Data tab to view additional applicant data.

When you initially access the Applicant Activity tab, the Current Status section is active. Click the Interview Schedule/Evaluation link or the Expenses link to view additional applicant activity information.

Page-Level Actions



Click the Add Applicant icon to display the Add New Applicant page.



Click the Save icon to save changes to the page.

Take Action and Go Use the Take Action field at the top of the page to perform actions that relate to the overall applicant record (without regard to any particular job opening). Select an action to perform, then click the Go button to initiate the action.

In this context, the following actions are available: *Add Applicant to New List, Add Applicant to Saved List, Add Person of Interest, Change Applicant Status, Forward Applicant, Link Applicant to Job, Manage Applicant Contracts, Merge as Source, Merge as Target, Pre-Employment Check, and Send Correspondence.*

See [Chapter 19, "Managing Applicants," Summary of Action Availability, page 560.](#)

Applicant Activity

This grid lists the job openings that the applicant is associated with. If the applicant applied without selecting a job opening, this application is included in the list as well.

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

Disposition An applicant's disposition is the applicant's status with regards to a particular job opening. The values are the statuses that have been defined for the Recruitment Summary status area. These statuses track the progress of an applicant through the recruiting process.

Click the disposition link to access the Disposition Details page.

Resume Click to open a new window that displays the applicant's resume. The window contents depend on the resume format:

- If the resume is an attachment, the file opens in the new window.
- If the resume was entered into the Resume Text field in the application, the new window displays the Applicant Resume page.

If no resume exists for a particular applicant (for example, the applicant instead completed the work experience fields in the online application), then this column is blank. If none of the applicants in the grid have resumes, the entire Resume column is hidden.

Take Action Use the Take Action field in the Applicant Activity grid to perform actions that relate to the specific job application. (However, some of the available actions affect the overall applicant record.) When you select an action, the system immediately initiates it; you do not need to click a separate Go button.

In this context, the following actions are available: *Create Interview Evaluation, Create Salary Package Model, Manage Applicant Checklists, Manage Interviews, Prepare for Hire, Prepare Job Offer, Print Application Details, Reject Applicant, and Route Applicant.*

See [Chapter 19, "Managing Applicants," Summary of Action Availability, page 560.](#)

Add New Disposition Click this link to create a new row in the Applicant Activity grid. The system displays the Disposition Details page, where you select the disposition to assign to the new row and you optionally identify a job opening for the new row. If you do not identify a job opening, the job opening field for the new row displays the text *No Job Opening Selected*.

Note. Instead of using this link, you can use the *Link Applicant to Job* action to associate the candidate with a specific job opening. Using the *Link Applicant to Job* action provides the benefit of checking to see if the job opening has questions and, if it does, automatically generating an email requesting that the applicant use Candidate Gateway to answer the questionnaire.

View Activity History and View Current Activities

Only one of these links is visible at a time; use them to toggle the Applicant Activity grid between showing only the applicant's current dispositions and showing both current and past dispositions.

When viewing activity history, the Applicant Activity grid displays the applicant's previous dispositions for those job openings where the disposition has changed over time. In this mode, the Applicant Activity grid does not have a Take Action field, the Job Opening and Disposition columns show only plain text, not links, and the Add New Disposition link is hidden.

Reviewing Disposition Details

Access the Disposition Details page (on the Manage Applicant page: Applicant Activity tab: Current Status section, click the link in the Disposition column).

Manage Applicant: Bob Montana

Disposition Details: 020 Applied

| | | | |
|---------------------|------------------------------------|-----------------------------------|------------|
| Applicant Name: | Bob Montana | Date Entered: | 09/01/2004 |
| ID: | 1027 | Print Job Opening | |
| Posting Title: | Manager-Compensation/Benefits | Job Opening ID: | 30023 |
| Job Opening Status: | 010 Open | Job Type: | Standard |
| Job Title: | Manager-Employee Relations | Job Code: | 600060 |
| Position Number: | | | |
| Business Unit: | GBIBU Global Business Institute BU | | |
| Job Family: | KADMIN Administrative Support | | |

[Return to Previous Page](#)

▼ Edit Disposition Details

| | | | |
|------------------|--|--|-------------------------------|
| Job Opening ID: | <input type="text" value="30023"/> | | Manager-Compensation/Benefits |
| *Status Code: | <input type="text" value="020 Applied"/> | | |
| Status Reason: | <input type="text"/> | | |
| Status Date: | <input type="text" value="09/13/2004"/> | | |
| Contract Number: | <input type="text"/> | | |

[Return to Previous Page](#)

Disposition Details page

Note. Page appearance varies depending on the applicant's disposition. The basic version of the page pictured here appears for most dispositions.

Disposition-Specific Page Elements

Additional fields appear for the three following dispositions:

- *Route*
See [Chapter 13, "Screening and Routing Applicants," Routing Applicants, page 417.](#)
- *Interview*
See [Chapter 14, "Interviewing Applicants," Making Final Recommendations, page 460.](#)

- *Offer*

See [Chapter 15, "Making Job Offers," Creating a Job Offer, page 473.](#)

Most of the disposition-specific page elements are associated with just one of these dispositions. However, there is one element, the Disposition History grid, that is common to all three. This grid displays the status applicant's status change history for the routings, interviews, and offers. The first column in the grid displays the status type: *Route*, *Interview*, or *Offer*. Clicking the link changes the page to the mode for the indicated recruiting area.

Edit Disposition Details

Use this group box to manually change an applicant's disposition when there is not a predefined recruiting process that applies a particular disposition.

Important! The best practice is to use the predefined recruiting processes to set the applicant's disposition. For example, the actions that you use to manage interviews, reject applicants, prepare offers, and so forth all set the disposition automatically. If you update the disposition manually, take care not to override dispositions for key actions.

Reviewing Interview Schedules and Evaluations

Access the Manage Applicant page: Applicant Activity tab: Interview Schedule/Evaluation section (on the Manage Applicant page, click the Interview Schedule/Evaluation link under the Applicant Activity tab).



See [Chapter 14, "Interviewing Applicants," Reviewing Applicant Interview Schedules and Evaluations, page 463.](#)

Reviewing Applicant Expenses

Access the Manage Applicant page: Applicant Activity tab: Expenses section (on the Manage Applicant page, click the Expenses link under the Applicant Activity tab).

Manage Applicant: Bob Montana

| | |
|---|------------------------------------|
| Name: Bob Montana | Applicant Type: External Applicant |
| Applicant ID: 1027 | POI Type: |
| Contact: Email | Status: 010 Active |
| Phone: 925/555-1212 | Address: 678 Oakdale Drive |
| Email: HCMGENUser1@ap6023fems.us.oracle.com | Pleasanton, CA 94588 |



 Take Action:
[Previous Applicant](#) | [Next Applicant](#) | [Applicant List](#)

Applicant Activity
Contact Notes
Applicant Data

[Current Status](#)
[Interview Schedule/Evaluation](#)
Expenses

| Expenses | | | | |
|----------|---------|----------|-------------|---------------------------------|
| Expense | Amount | Currency | Charge Date | Expense Details |
| Parking | \$10.00 | USD | 10/19/2004 | Expense Details |

Total Expenses: \$10.00 USD

Manage Applicant page: Applicant Activity tab: Expenses section

Expenses

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

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

Adding Applicant Expenses

Access the Add Expense page (on the Manage Applicant page: Applicant Activity tab: Expenses section, click the Add New Expense link or the Expense Details link).

Add Expense page

| | |
|-----------------------|--|
| Expense Code | Select an expense code, such as airfare, car rental, travel, or parking. |
| Expense Amount | Enter the expense amount and select a currency. |
| Charge Date | Enter the date on which the expense occurred. |
| Business Unit | Select the business unit to which the expense should be charged. |
| Department | Select the department to which the expense should be charged. |

Managing Contact Notes

This section provides an overview of contact notes and discusses how to:

- Review contact notes and interested parties.
- Add contact notes.

Understanding Contact Notes

Use the Manage Applicant page: Contact Notes tab to review existing contact notes and add new contact notes.

System-Generated Contact Notes

Talent Acquisition Manager automatically creates contact notes when you generate letters or email during the recruiting process. For example, the system creates contact notes when you:

- Generate an interview letter.

- Create an offer letter.
- Forward an applicant.
- Generate ad hoc correspondence.

When creating notes for letters, the letter itself becomes an attachment to the note.

Manually-Created Contact Notes

Users can manually create notes (with optional attachments) to record interactions that have not been automatically captured. When creating a note, the user indicates the contact method by choosing from the values that your organization establishes on the Contact Methods page. For example, contact methods can include inbound or outbound phone calls, emails, faxes, and so on.

See [Chapter 6, "Setting Up Additional Recruiting Definitions," Defining Contact Method Types, page 100.](#)

Users can make contact notes public or private. Only the user who creates a private note can view that contact note. All recruiters and hiring managers can view public notes.

Page Used to Manage Contact Notes

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|---|------------------------|--|--|
| Manage Applicant page: Contact Notes tab | HRS_MANAGE_APP | Recruiting, Find Applicants, Find Applicants Click an applicant name link in the Search Results grid on the Find Applicants page. Click the Contact Notes tab on the Manage Applicant page. | Review and create contact notes for applicants. |
| Add Contact Note | HRS_APP_NOTES | In the Manage Applicant page: Contact Notes tab, click the Add Contact Note link or the Subject link for an existing note. | Add notes, with optional attachments, to record about interactions with an applicant. |
| Proxy Details | HRS_APP_PROXY_SBP | Click the Proxy Details link on the Add Contact Note page. This link appears only if the applicant was submitted through a recruitment service that is acting as the applicant's proxy. | View the name, phone number, and email address of the contact for the recruitment service that is acting as the applicant's proxy. |

Reviewing Contact Notes and Interested Parties

Access the Manage Applicant page: Contact Notes tab (on the Manage Applicant page, click the Contact Notes tab).

Manage Applicant: Bob Montana

| | | | |
|---------------|--|-----------------|---|
| Name: | Bob Montana | Applicant Type: | External Applicant |
| Applicant ID: | 1027 | POI Type: | |
| Contact: | Email | Status: | 010 Active |
| Phone: | 925/555-1212 | Address: | 678 Oakdale Drive Pleasanton, CA 94588 |
| Email: | HCMGENUser1@ap6023fems.us.oracle.com | | |

Take Action:

Go

[Previous Applicant](#) | [Next Applicant](#) | [Applicant List](#)

Applicant Activity
Contact Notes
Applicant Data

Contact History
Customize | Find | View All |
First 1-3 of 3 Last

| Owner ID | Sender | Contact Date | Subject | Delete |
|----------|----------------|--------------|--------------------------------------|--------|
| KU0007 | Betty Locherty | 08/19/2009 | Offer Letter | |
| KU0007 | Betty Locherty | 08/19/2009 | Directions to Office | |
| KU0007 | Betty Locherty | 08/19/2009 | Interview Letter | |

[+ Add Contact Note](#)

Interested Parties

| Name | Email | |
|---|---|--|
| <input type="text" value="Stephanie Massey"/> | <input type="text" value="stephanie.massey@gbi.com"/> | |

[+ Add Interested Parties](#)

Manage Applicant page: Contact Notes tab

Contact History

This grid lists the contact notes for an applicant. System-generated notes and manually-created notes appear together in the grid. Private notes are hidden from all users other than their creators.

Owner ID and Recruiter Name These columns display the user ID and name of the person who created the note. For system-generated notes, these columns display information about the person who performed the action that triggered the note creation.

Copyright © 1988, 2010, Oracle and/or its affiliates. All Rights Reserved.

577

- Subject** Displays the subject of the communication. For example, if the system created the contact note when a recruiter used the *Forward Applicant* action, the subject text is the subject that the recruiter entered in the forwarding message.
- Contact notes for letters have the subject *Interview Letter*, *Offer Letter*, or *Application Letter*.
- Click the subject text to access the full text of the communication in the Add Note page or the Forward Applicant page.
- Add Contact Note** Click to access the Add Note page, where you can add a new contact note.

Interested Parties

Use this group box to enter the names and email addresses of interested parties. When you send correspondence to an applicant, you can select the Include Interested Parties option on the Send Correspondence page to send email correspondence to the persons that you list here.

See [Chapter 19, "Managing Applicants," Sending Ad Hoc Correspondence, page 597.](#)






Adding Contact Notes

Access the Add Contact Note page (on the Manage Applicant page: Contact Notes tab, click the Add Contact Note link or click the Subject link for an existing contact note).




Add Contact Note

Name: [Bob Montana](#) **Applicant Type:** External Applicant
Applicant ID: 1027
Contact: EMail **Status:** 010 Active
Phone: 925/555-1212 **Address:** 678 Oakdale Drive
Email: HCMGENUser1@ap6023fems.us.oracle.com Pleasanton, CA 94588

Applicant Notes

Author: Betty Locherty **Contact Date:** 08/19/2009 
Contact Method: Outbound Email  **Note Audience:** Public 
***Subject:** Directions to Office
Notes: Sent Bob a document with directions to the office.  

Attachments

[Customize](#) | [Find](#) | [View All](#) |  First  1 of 1  Last

| Filename | Description |
|---|----------------------|
| <input type="checkbox"/> Directions to Headquarters.doc | <input type="text"/> |

Add Contact Note page

Proxy Details

This link appears only if the applicant was submitted through a recruitment service. Click the link to display the Proxy Details page.

Email

Click this link to open the Send Correspondence page so that you can send email or a letter to the applicant.

See [Chapter 19, "Managing Applicants," Sending Correspondence and Recruitment Letters, page 591.](#)

Applicant Notes

| | |
|-----------------------|--|
| Contact Method | Select a contact method, choosing from the methods that are defined on the Contact Method page. See Chapter 6, "Setting Up Additional Recruiting Definitions," Defining Contact Method Types, page 100. |
| Note Audience | Select <i>Public</i> or <i>Private</i> to control who can see the note. Only the user who creates a private note can view that contact note. All recruiters and hiring managers can view public notes. |
| Subject | Enter a subject. The subject that you enter appears in the Contact History group box on the Manage Applicant page: Contact Notes tab. |
| Notes | Enter the text of the note. |

Attachments

Use this group box for attachments that pertain to the interactions that you had with the applicant.

Click the Add Attachment link to display a browser window where you can search for the attachment to upload. Click the Delete Attachment link to remove the selected attachment from the note.

Reviewing Applicant Data

This section discusses how to:

- Review the application summary for an applicant.
- Review application details.
- Review questionnaire details.

Pages Used to Review Applicant Data

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|--|------------------------|--|---|
| Manage Applicant page: Applicant Data tab | HRS_MANAGE_APP | Recruiting, Find Applicants, Find Applicants Click an applicant name link in the Search Results grid on the Find Applicants page. Click the Applicant Data tab on the Manage Applicant page. | View an applicant's applications, resumes, contact information, and eligibility and identity information. |
| Application Details | HRS_APP_PROFILE | Click the Application icon on the Manage Applicant page: Applicant Data tab: Applications and Resumes section. | Review application details, including the applicant's resume, preferences, and qualifications. |
| View Questionnaire | HRS_AP_QSTNR_RSLT | Click the View Questionnaire link on the Application Details page. | Review an applicant's answers to screening questions that the applicant answered while preparing the application in Candidate Gateway. |

Reviewing the Application Summary for an Applicant

Access the Manage Applicant page: Applicant Data tab: Applications & Resumes section (click the Applicant Data tab on the Manage Applicant page).

Manage Applicant: Bob Montana

Name: [Bob Montana](#) **Applicant Type:** External Applicant
Applicant ID: 1027 **POI Type:**
Contact: Email **Status:** 010 Active
Phone: 925/555-1212 **Address:** 678 Oakdale Drive
Email: HCMGENUser1@ap6023fems.us.oracle.com Pleasanton, CA 94588

Take Action:
[Previous Applicant](#) | [Next Applicant](#) | [Applicant List](#)

Applicant Activity | Contact Notes | **Applicant Data**

[Applications & Resumes](#) | [Contact](#) | [Verification](#) | [Eligibility & Identity](#)

| Applications | | | |
|----------------|-------------------|-----------------|-------------|
| Resume Title | Last Updated | Last Updated By | Application |
| HRIS Resume | 09/12/2004 1:02PM | SAMPLE | |
| Manager Resume | 09/13/2004 8:21PM | SAMPLE | |
| Analyst Resume | 09/13/2004 8:24PM | SAMPLE | |
| Finance Resume | 09/13/2004 8:34PM | SAMPLE | |

[Add Application](#)

Manage Applicant page: Applicant Data tab: Applications & Resumes section

Note. The Contact, Verification, and Eligibility & Identity sections under the Applicant Data tab correspond to the equivalent sections on the Add New Applicant page.

See [Chapter 11, "Entering Applicant Data," page 299.](#)

Applications

Use this group box to view all of an applicant's applications.

Application Click the icon in this column to open an existing application in the Application Details page, where you can view and edit the application.

Add Application Click to access the Application Details page in add mode so that you can add a new application for the applicant.

Reviewing Application Details

Access the Application Details page (click the Application icon on the Manage Applicants page: Applicant Data tab: Applications and Resume section).

The pages that you use to review and edit applicant data are the same as those you use to add new applicant data.

See [Chapter 11, "Entering Applicant Data," page 299](#).

When you are reviewing an existing application (rather than creating a new one), this additional page element is available:

View Questionnaire This link appears in the Job Openings grid. Click to access the View Questionnaire page, where you can review the applicant's answers to questions to screening questionnaires that the applicant completed in Candidate Gateway.

Reviewing Questionnaire Details

Access the View Questionnaire page (click the View Questionnaire link on the Application Details page).

Manage Applicant: Rosemary Wright

View Questionnaire

Rosemary Wright

Applicant ID: 300138

Job Opening: 500395 Eldercarers Needed in Various suburbs of Dallas (Ref:500395)

Question: 1004 Are you willing to work overtime periodically ?

| Answers | | |
|---------|-----|-------------------------------------|
| 1027 | No | <input type="checkbox"/> |
| 1037 | Yes | <input checked="" type="checkbox"/> |

Question: 1034 Please discuss in a short essay the protocols you would establish in a newly formed Burns Unit in a rural hospital.

| Answers | |
|---------|---|
| | 1. Treatment protocols. 2. Privacy protocols. 3. Hiring protocols. 4. Additional administrative protocols. |

Evaluators for the Open Ended Question

Average Review Points:

| Evaluator Response | | | |
|--------------------|----------------|--|--|
| EmplID | Name | | Points for Answer |
| KU0007 | Betty Locherty | | <input style="width: 80%;" type="text"/> |

View Questionnaire page

This page shows questions that the applicant answered online.

For each multiple-choice question, the page displays the possible answers; a selected check box indicates the applicant's answer.

For each open-ended question, the page displays the question, the applicant's answer, and a grid that lists the evaluators for the answer. Evaluators can use this grid to award points to the answer.

Important! This page displays does not display questions from the Prescreening and Online Screening levels.

Linking Applicants to Job Openings

This section provides an overview of how to link applicants to job openings and discusses how to link applicants to job openings.

Understanding How to Link Applicants to Job Openings

If you find an applicant who is qualified for a specific job opening and should be considered, you can link the applicant to that job opening.

Establishing Links Between Applicants and Jobs

The link between an applicant and a job is what causes the job opening to appear on the Manage Applicant page and the applicant to appear on the Job Opening page.

Applicants are automatically linked to job openings when they apply for the job using Candidate Gateway or when a recruiter uses the Application Details page to add job openings to the applicant's application.

You can also link applicants to jobs by invoking the *Link Applicant to Job* action. When you link an applicant to a job using this method, the system displays the Link to Job Opening page. Use this page to specify one or more job openings to which the applicants is to be linked.

Questionnaires in Linked Jobs

When a user links an applicant to a job opening either by using the *Link Applicant to Job* action or by adding the job opening on the Application Details page, the system determines whether the job opening includes screening questions. If it does, the system sends an email informing the applicant of the link and asking the applicant to use Candidate Gateway to answer the questions. A link in the email takes the applicant to Candidate Gateway, where the applicant can sign in to an existing account or create a new account that will be automatically be associated with the existing applicant record.

When multiple job openings are added to the application at once, the system sends only one email per applicant. The system also creates a contact note with a record of the outgoing email.

The request to answer questions is sent only to applicants who have provided an email address. Applicants without email addresses are still linked to the job opening, but no notification can be sent. When you link applicants to job openings using the *Link to Job Opening* action, the Link to Job Openings page displays information about which applicants do not have email addresses and therefore will not receive the notification.

When the candidate signs on to Candidate Gateway, the Welcome page displays a notification with the subject *Questionnaire Completion <job opening ID>*. The applicant can click the notification subject to complete an application for the job opening or openings; the application automatically includes the associated questions.

Because submitted applications are never editable in Candidate Gateway, the applicant will *not* be able to answer questions in an existing application. Instead, the applicant must create a new application, in effect reapplying for the job opening that is already linked to the applicant's record.

Important! Be sure the text of your email notification gives the applicant clear instructions for reapplying.

The Recruiter Alerts pagelet (part of PeopleSoft Enterprise HRMS Portal Pack) includes an alert that displays the number of applicants who have not completed questionnaires for the job openings for which the user is on the recruiting team. Users can click the number to access the Questionnaire Request page, which lists each outstanding request and enables the user to send reminder notifications to selected applicants.

Pages Used to Link Applicants to Job Openings

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|---------------------|------------------------|--|-------------------------------------|
| Link to Job Opening | HRS_GACT_RCM_STS | Recruiting, Find Applicants, Find Applicants Search for applicants, then in the Search Results grid, select <i>Link Applicant to Job</i> in the Take Action field or the Group Action field. (This action is also available on other pages.) | Link an applicant to a job opening. |

Linking Applicants to Job Openings

Access the Link to Job Opening page (on the Find Applicants page, select *Link Applicant to Job* in the Take Action field for an applicant).

Link to Job Opening

| Applicants to be linked. | | Customize First ◀ 1-3 of 3 ▶ Last |
|--------------------------|----------------|--|
| Applicant | Name | |
| 11 | Yvonne Smith | |
| 17 | Jim Furlong | |
| 18 | Theresa Kelsey | |

Enter Disposition Information

*Status Code: ▼

Status Reason: ▼

Status Date:

Enter Job Openings

| Job Opening ID | Posting Title | |
|------------------------------------|------------------|--|
| <input type="text" value="30005"/> | Analyst-Business | |

[Add Job Opening](#)

| Applicants Without Email | | Customize First ◀ 1 of 1 ▶ Last |
|--------------------------|--------------|--|
| Applicant ID | Name | |
| 11 | Yvonne Smith | |

Link to Job Opening page

Applicants To Be Linked

This grid lists the applicants that you selected when you initiated the *Link Applicant to Job* action.

Enter Disposition Information

Use this group box to enter the initial disposition for the applicants with regard to the job openings to which they are being linked.

Status Code and Status Reason Select a status code and status reason. The delivered default status code is *Linked*.

Status Date Enter the date that the applicant is linked to the job. The default is the current date.

Enter Job Openings

Select the job openings to which you want to link the applicant. Security prevents you from adding any job openings that you do not already have permission to access.

See [Chapter 6, "Setting Up Additional Recruiting Definitions," Understanding Recruiting Security, page 87.](#)

If the job opening is associated with any questions, the system sends the applicant an email with directions for signing on to Candidate Gateway and submitting an application for the job; the online application automatically includes the questions.

Applicants Without Email

This grid lists applicants who do not have an email address in the system.

These applicants will not receive an email notifying them that they need to complete questionnaires for newly-linked job openings.

Printing Application Details

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

- Print a single application.
- Print multiple applications.

Understanding How to Print Application Details


To print application details for one or more applicants, use the *Print Application Details* action. This action is available in several contexts:

- The Search Results section of the Find Applicants page (individual or group action).
- The Manage Applicants section of the Job Opening page (individual or group action).
- The Applicant Activity grid on the Manage Applicant page (one application only).

When you select the *Print Application Details* action for a single application, the system displays a read-only Application Details page that is formatted for printing. Data appears in collapsible sections. Initially, all sections are expanded, but you can selectively collapse sections before printing to control the amount of detail included in the printed output.

When you select the *Print Application Details* action for a group, the system displays the Print Application Details page. This is a standard run control page such as the ones you use to generate other reports. Use this page to submit a request to PeopleSoft Process Scheduler, which then generates the output for each selected application. When printing multiple applications, the system always includes all of the sections in the report.

Pages Used to Print Application Details

| Page Name | Definition Name | Navigation | Usage |
|--|--------------------|--|---|
| Application Details (printer-friendly) | HRS_APP_PRINT_PAGE | <ul style="list-style-type: none"> Recruiting, Find Applicants, Find Applicants <p>In the Search Results grid, select <i>Print Application Details</i> in the Take Action field.</p> <p>(This action is also available on other pages.)</p> <ul style="list-style-type: none"> On the Find Applicants page, click an applicant name to access the Manage Applicant page, then click the Applicant Data tab. <p> Click the Application icon to access the Application Details page, then click the Print Application Details link.</p> | Displays application data in one long printer-friendly page. |
| Print Application Details | HRS_RUN_HRS036 | <p>Recruiting, Find Applicants, Find Applicants</p> <p>Search for applicants, then in the Search Results grid, select <i>Print Application Details</i> in the Group Action field.</p> <p>(This action is also available on other pages.)</p> | Submit a PeopleSoft Process Scheduler request to print all of the selected applications in batch. |

Printing a Single Application

Access the Application Details (printer-friendly) page (select the *Print Application Details* action in the Take Action field in the Search Results grid on the Find Applicants page).

Application Details

[Return to Previous Page](#) [Print this Page](#)

▼ General Information

| | | |
|--------------------------|--------------------|---------------|
| Display Name: | Justin Curtis | |
| Applicant ID: | 100016 | |
| Applicant Type: | External Applicant | |
| Applicant Status: | 010 Active | |
| Job Opening ID: | 10041 | Web Developer |

▼ Resume Text

| | | |
|-----------------------|---|--|
| Resume Title: | j_curtis_resume_1 | |
| Language Code: | ENG | |
| Resume Text: | Justin Curtis 4460 Hacienda Drive Pleasanton CA 94588 | |

▼ Contact Information

| | | |
|---------------------|--------|--|
| Name Prefix: | | |
| First Name: | Justin | |
| Middle Name: | | |
| Last Name: | Curtis | |
| Name Suffix: | | |
| Address: | | |

Application Details (printer-friendly)

Note. Only part of the page is shown here.

This page displays all of the application data in a printer-friendly format. Scroll to review all of the data.

Print this Page Click this button to open a standard print dialog box and print the job opening. If you collapse any sections before printing, those sections appear collapsed on the final printout.

The final print output is further optimized for printing and thus differs from what you would get if you simply used your browser's print command. For example, the navigation links at the top of the page do not appear on the printout, and the section titles are rendered as dark text rather than as white text in a colored bar.

Printing Multiple Applications

Access the Print Application Details page (select the *Print Application Details* action in the Group Action field under the Search Results grid on the Find Applicants page).

Print Application Details

Run Control ID: RUN_HRS036_20090531122526 [Report Manager](#)

Language: [Process Monitor](#)

[Return to Previous Page](#)

Print Application Details page

The system provides a run control ID for the Print Application Details process.

Select the language for the printouts, then click the Run button to generate the Application Details (HRS036) SQR report.

Sending Correspondence and Recruitment Letters

This section provides overviews of the Send Correspondence action and of context-specific recruitment letters, then discusses how to:

- Send ad hoc correspondence.
- Find email addresses.
- Generate batch recruitment letters.

Understanding the Send Correspondence Action

This overview describes the Send Correspondence action, which you use to produce ad hoc email and letters for applicants.

Send Correspondence

Use the Send Correspondence action to send the following types of correspondence:

- An email with message text that you manually enter.
- An email with message text that the system generates based on a template that you select.
- A letter that the system generates based on a template that you select.

Recruiting Solutions uses Oracle's XML Publisher to generate recruitment letters. 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.

The Send Correspondence action is available for a single applicant from the Manage Applicant page, and it is available for one or more applicants on the Find Applicants page, the Job Opening page, and the Applicant List page.

Note. You cannot use this method to send offer letters or interview letters, which require the context of their specific pages.

Email Generation

When you invoke the Send Correspondence action, the Send Correspondence page appears with *Email* as the default contact method. You can enter freeform message text, or you can select from a list of available templates. If you select a template, the system creates the message text, merging applicant data into the template as necessary. You can preview the system-generated message, but you cannot modify it.

Both template-based and freeform email messages require you to enter the email subject. You can optionally add attachments to the email as well.

Note. To support freeform text messages, the system applies the delivered HRS_EMAIL_GENERIC template when no other template is selected. As delivered, this template places a greeting before your message text and a sign-off after your message text. To remove this wrapper, you can modify the template.

Letter Generation

If you change the contact method to *Letter*, you must select a letter template. Once you select a template, the Generate button appears. Clicking this button generates a merged letter and opens it in a new browser window so that you can print and send it. You can optionally preview the merged letter before generating it.

When you generate a letter, it is up to you to print and send it. Letters that you generate using Send Correspondence are *not* added to the queue of letters for the HRS Letter Generation process (HRSLETTER).

Contact Notes Created by Send Correspondence

When you send email or generate a letter, the system saves the message as a contact note.

You can view the note on the Manage Applicant page: Contact Notes tab. The note is designated as public or private based on the setting you choose when you create the correspondence. Anyone can view public notes, but only the sender can view private notes.

For email correspondence, the email subject becomes the note subject. When you click the subject to view the note details, the correspondence appears in the Send Notification page. You can modify the correspondence (though you cannot change the contact method) and then resent the correspondence. For template-based email, you can change the subject, the attachments, and the Cc and Bcc recipients, but you cannot change the template selection, nor can you modify the message.

For letter correspondence, the default note subject is *Application Letter*. When you click the subject to view the note details, the Add Contact Note page appears, and the letter appears as an attachment to the note. You can edit the note as necessary, including replacing the attachment if you modified the generated letter before printing and sending it.

Note. If you do not end up sending the letter, you should manually delete the contact note from the applicant's record. If you modify the letter before sending it, you should update the contact note accordingly.

Template Selection

The Send Correspondence action uses XMLP templates for both email and letter correspondence. The templates that are available for selection are those with the HRS_APP_LETTERS report definition.

See *Enterprise PeopleTools PeopleBook: XML Publisher for PeopleSoft Enterprise*

Understanding Context-Specific Recruitment Letters

This overview discusses the generation and delivery of context-specific recruitment letters.

Types of Recruitment Letters

PeopleSoft Talent Acquisition manager enables you to generate context-specific recruitment letters during these recruiting activities:

- Entering or reviewing application information on the Application Details page
- Scheduling applicant interviews on the Interview Schedule page.
- Preparing job offers on the Prepare Job Offer page

The pages where you perform these recruiting activities all display a Letter field that you use to select a letter template.

Batch Letter Generation Vs. Manual Letter Generation

All of the pages that support recruitment letters include a Generate Letter link that you click to manually generate the letter. The system merges applicant data into the selected template and opens the resulting letter in a new browser window.

If you select a letter but do not generate it manually, the system automatically places the letter in a queue to be processed by the HRS Letter Generation (HRSLETTR) Application Engine process. When a letter has been placed in the queue but has not yet been processed, manually generating the letter removes it from the queue.

Because manually generating a letter prevents it from being processed by the HRS Letter Generation process, the person who manually generates the letter is responsible for delivering the letter.

Note. Applicant letters that you send from the Send Correspondence page are never added to the queue for the HRS Letter Generation process.

Letter Delivery

After generating a letter manually, users have two delivery options: hard copy and email.

For hard copy delivery, users can print the letter from the browser window where the letter is displayed. Users can also save the letter to a local disk and print it from there. The default file format for the generated letter is .rtf (rich text file), which is compatible with most word processing applications.

For email delivery, an Email Applicant link enables users to access the Send Correspondence page with the generated letter already attached. Users can enter their own email message text before sending. If there is no email address for the applicant, the system displays a warning.

Note. Only interview and job offer letters can be emailed. The Application Details page does not have the Email Applicant option.

Clicking the Email Applicant link before generating the letter displays the Send Correspondence page without any attachments. Although you can select letter templates from the Send Correspondence page, the available templates are not context-sensitive: choices are always the same as those on the Application Details page, even if you access the Send Correspondence page from the Interview Schedule page or the Prepare Job Offer page.

Modified Letters and the Upload Option

To modify a template-based letter, you must generate it, save it locally, and make your changes to the local copy. To ensure accurate records, you must then upload the modified document to the system.

For interview letters and offer letters, the system provides an Upload Letter link that you can click to upload the modified document to the correct context. If you subsequently click the Email Applicant link, the system automatically attaches the modified letter (rather than the original) to the email.

Contact Notes

Contact notes, which appear on the Manage Applicant page: Contact Notes tab, are generated for all recruitment letters. By default, the contact notes are designated as public, but you can make a note private so that only the sender can see it.

The system generates contact notes when:

- You generate a recruitment letter.

If you generate a letter but do not send it, you should manually delete the contact note from the applicant's record.

- You upload a recruitment letter.

The Application Details page does not have an upload link. If you modify an application letter, you should manually replace the attachment in the related contact note.

- You email a recruitment letter.
- The HRS Letter Generation process also creates contact notes for letters that it produces in batch.

Note. If you perform multiple letter-related actions, the applicant ends up with multiple contact notes that refer to the same interaction. For example, if you generate a letter, then upload a modified letter, then email the modified letter, the system creates three separate contact notes related to this one letter. To eliminate redundant contact notes, delete these extra contact notes manually on the Manage Applicant page: Contact Notes tab.

When you email a letter to the applicant, the email subject becomes the contact note subject. When you generate or upload a letter, the default subject text describes the letter context: *Application Letter*, *Interview Letter*, or *Offer Letter*.

Clicking the subject of a contact note opens a page that displays the note details; the actual letter appears as an attachment to the note. You can edit the note as necessary. If the contact note is for an email, the note details appear in the Send Notification page, where you can modify the email and then resend it.

Letter Selection

Recruitment letters use XML Publisher templates. The templates that are available for selection are those with the following report definitions:

- Templates from the HRS_APP_LET report definition are available from the Application Details page.
- Templates from the HRS_INT_LET report definition are available from the Interview Schedule page.
- Templates from the HRS_OFF_LET report definition are available from the Prepare Job Offer page.

Delivered Letter Templates

Talent Acquisition manager delivers the following recruitment letter templates:

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

See Also

[Chapter 11, "Entering Applicant Data," Entering Application Details, page 313](#)

[Chapter 14, "Interviewing Applicants," Scheduling Interviews, page 425](#)

[Chapter 15, "Making Job Offers," Creating Job Offers, page 469](#)

Enterprise PeopleTools PeopleBook: XML Publisher for PeopleSoft Enterprise

Pages Used to Send Correspondence and Recruitment Letters

| Page Name | Definition Name | Navigation | Usage |
|------------------------------|------------------------|---|--|
| Send Correspondence | HRS_SEND_CRSP | <p>Recruiting, Find Applicants, Find Applicants</p> <p>Search for applicants, then in the Search Results grid, select <i>Send Correspondence</i> in the Take Action field or the Group Action field.</p> <p>(This action is also available on other pages.)</p> | <p>Send ad hoc letters and emails to applicants. Letters must be template-based; email can be freeform or template-based.</p> |
| Send Correspondence Preview | HRS_FWRD_APP_PRVW | <p>Click the Preview button on the Send Correspondence page when it is configured to send a freeform email.</p> | <p>Preview the content of a freeform email. You must return to the Send Correspondence page before sending the email.</p> <p>Note. The default template that the system uses for freeform email adds text before and after the message that you create; use this page to see your message with the template text applied.</p> |
| Find Email Address | HRS_FND_EMAIL_ADDR | <p>Click the Find link on the Send Correspondence page.</p> | <p>Search for and select employees to whom you want to forward applicants.</p> |
| Generate Recruitment Letters | HRS_RUN_LETTERS | <p>Recruiting, Administration, Generate Recruitment Letters, Generate Recruitment Letters</p> | <p>Run the process that generates letters from the recruiting letter queue.</p> |

Sending Ad Hoc Correspondence

Access the Send Correspondence page (select the *Send Correspondence* action in the Take Action or Group Action field on the Find Applicants, Manage Applicant, or Job Opening page).

Send Correspondence

Preview
Send
Cancel

Message Type and Method

*Contact Method: ▼

Letter: ▼

Recipient Information

To: [?]

Cc: [?] [Find](#)

Bcc: [?] [Find](#)

Include Interested Parties

Sender Information

From:

Send Correspondence page (1 of 2)

Send Correspondence page (2 of 2)

Message Type and Method

Contact Method

Select *Email* or *Letter*.

The default value is *Email*. In this mode, the page shows standard email fields.

If you select *Letter*:

- In the Recipient Information section, the Cc and Bcc fields are hidden.
- In the Message section, the Subject and Message fields are hidden, and a Notes field appears instead.
- The Sender Information and Attachments sections are hidden entirely.

Letter

Select a letter template to use. This field is optional when you send email and required when you send a letter.

Recipient Information

- To** This field appears for both email and letter correspondence. It displays the names of the applicants to whom you are sending correspondence and is not editable.
- If you are sending the correspondence to multiple applicants, all names appear together. However, the system sends separate correspondence to each applicant: template-based messages are generated separately for each recipient, and the applicants do not see each other's names in the To field of the email they receive.
- Cc, Bcc, and Find** These fields appear only for email correspondence.
- By default, the sender's preferred email address appears in the Cc field, and the Bcc field is empty. You can edit these fields directly to add or remove recipients, or you can look up recipients who are employees by clicking the Find link to access the Find Email Address page.
- See [Chapter 19, "Managing Applicants," Finding Email Addresses, page 601](#).
- Include Interested Parties** Select this check box if you want the people listed as interested parties for the applicant to receive a copy of this email. An applicant's interested parties are listed on the Manage Applicant page: Contact Notes tab.
- The system sends the interested parties copies of the correspondence, but does not display their names or email addresses on this page.

Sender Information

- If the Contact Method is *Email*, the From field in this section displays the sender's name.
- If the Contact Method is *Letter*, this entire section is hidden.

Message

- Subject** This field appears only for email correspondence.
- Enter the email subject. This field is required for email correspondence (whether freeform or template-based).
- Access** This field appears for both email and letter correspondence.
- Select *Public* to allow any user to view the contact note for this correspondence.
- Select *Private* to allow only the sender access to the contact note.

Message

This field appears only for email correspondence.

For freeform email, enter the text of the email message. If you select a template, this field disappears until you click the Preview button, at which point the field displays the non-editable template-based message text.

Note. To support freeform text messages, the system applies the delivered HRS_EMAIL_GENERIC template when no other template is selected. As delivered, this template places a greeting before your message text and a sign-off after your message text. If your organization is using the delivered template, your message should not duplicate the greeting or sign-off text from the template.

Notes

This field appears only for letter correspondence.

Enter any comments that should be saved in the contact note that the system creates when it generates the letter.

Attachments

If the Contact Method is *Email*, use this section to add attachments to and remove attachments from the email.

If the Contact Method is *Letter*, this entire section is hidden.

Action Buttons**Preview**

Click to preview the email or letter.

When you preview a letter or a template-based email, the message text appears directly on the Send Correspondence page. If you are not satisfied with what you see, select a different letter (or clear the Letter field) to make changes.

When you preview a freeform email, the message text appears on the Send Correspondence Preview page. You can return to the Send Correspondence page without sending.

Send

Click to send the email and create the associated contact note.

This button appears only when the Contact Method is *Email*.

Generate

Click to generate a letter and display it in a new browser window. The system creates the associated contact note immediately. If you don't print and send the letter, be sure to delete the contact note.

When you generate the letter, the original browser window returns to the page from which you invoked the Send Correspondence action.

Resend

This button appears only if you access the page from the applicant's list of contact notes (under the Contact Notes tab on the Manage Applicant page). Click to resend email correspondence if there were delivery issues or if you have modified the email. You can always modify the subject, the attachments, and the Cc and Bcc recipients before resending, but you can modify the message text only for freeform correspondence.

Cancel

Click this button to return to the previous page without sending the correspondence.

Finding Email Addresses

Access the Find Email Address page (click the Find link on the Send Correspondence page or the Forward Applicant page).

Find Email Address

Find Employees

Find Employees

Employee ID:

Name:

Search Results Customize | View All | First | Last

| | EmpID | Name | Email Type | Email Address | Preferred |
|--------------------------|-----------|-------------------|------------|--------------------------------------|-----------|
| <input type="checkbox"/> | ADCRM1002 | Melissa Richards | Home | HCMGENUser1@ap6023fems.us.oracle.com | Y |
| <input type="checkbox"/> | FAPK0318 | Melissa Lee | Campus | HCMGENUser1@ap6023fems.us.oracle.com | Y |
| <input type="checkbox"/> | FGCWR01 | Melissa Moore | Business | HCMGENUser1@ap6023fems.us.oracle.com | Y |
| <input type="checkbox"/> | KUD004 | Melissa Rosenberg | Home | HCMGENUser1@ap6023fems.us.oracle.com | Y |

[Select All](#) [Deselect All](#)

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 the Add Selected button to add their email addresses to the appropriate fields on the page from which you initiated the email address lookup.

Preferred

Indicates whether this is the preferred email address for the employee. If an employee has multiple email addresses, the system lists all email addresses and indicates which email address is the preferred email address so that you can select the email address that is most appropriate.

Generating Batch Recruitment Letters

Access the Generate Recruitment Letters page (Recruiting, Administration, Generate Recruitment Letters, Generate Recruitment Letters).

Generate Recruitment Letters page

Language

Choose a language and select the Specified option to generate all letters using the language that you explicitly select.

Select the Recipient's option to print each letter in the preferred language of its recipient. In this case, the language that you select in the Language field is used only when there is no record of the recipient's preferred language.

Run

Click to run the HRS Letter Generation job (HRSLETTER) using PeopleSoft Process Scheduler.

Note. If you select *Printer* in the Type field on the Process Scheduler Request page, you must enter the URL address for your printer in the Output Destination field.

Forwarding Applicants

This section provides an overview of applicant forwarding and discusses how to:

- Forward applicants.
- Preview the email.

Understanding Applicant Forwarding

Recruiters can forward applicants to one or more persons to enable those persons to review the applicant. When recruiters forward an applicant, the system sends a notification (HRS_FORWARD_APPLICANT) to the people that the recruiter specifies on the Forward Applicant page.

Forwarding an applicant is similar to routing an applicant. However, when you forward an applicant, the system does not change the applicant disposition. The system does, however, add a contact note to the Manage Applicant page: Contact Notes tab.

Pages Used to Forward Applicants

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|---------------------------|------------------------|--|---------------------|
| Forward Applicant | HRS_FWRD_APPL | Recruiting, Find Applicants, Find Applicants Search for applicants, then in the Search Results grid, select <i>Forward Applicant</i> in the Take Action field or the Group Action field. (This action is also available on other pages.) | Forward 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 (on the Find Applicants page, select *Forward Applicant* in the Take Action field for an applicant).

Forward Applicant

Enter email address of the person to whom you are sending this information. Select the "Send" button when you are finished. Choose the "Preview" button to preview the email.

| Forward Applicant | | Customize | View All | First | 1-4 of 4 | Last |
|-------------------|-----|-----------|----------|-------|----------|------|
| Applicant Name | ID | | | | | |
| Katrina Brown | 277 | | | | | |
| Diane Ironside | 280 | | | | | |
| Otto Waalkes | 3 | | | | | |
| Jim Furlong | 17 | | | | | |

Recipient Information

*To: [Find](#)

Cc: [Find](#)

Bcc: [Find](#)

Forward Applicant page (1 of 2)

Sender Information

From: Betty Locherty

Message

***Subject:** What do you think?

***Access:** Public

Message: Take a look at these applicants and let me know what you think.

Preview Send Cancel

Forward Applicant page (2 of 2)

Page-Level Actions

Preview

Click to access the Forward Applicant Preview page, where you can preview the email before you send it. Before you can preview the message, you must enter an email address and a message subject.

Forward Applicant

This group box displays the names and IDs of the applicants that you selected to forward.

Recipient Information

Use this group box to enter email addresses of the people to whom you want to forward these applicants.

Find Click to access the Find Email Address page, where you can search for and select employees to whom you want to forward these applicants.

See Chapter 19, "Managing Applicants," Finding Email Addresses, page 601.

Message

Use this group box to enter a subject for the message that you are sending and the actual message.

Access Select *Public* to allow any user to view the contact note for this correspondence.
 Select *Private* to allow only the sender access to the contact note.

Previewing the Email

Access the Forward Applicant Preview page (click the Preview button on the Forward Applicant page).

Forward Applicant Preview

***To:**

Cc:

Bcc:

From:

Subject:

Message

Take a look at this applicant and let me know if you're interested.

Applicant Name : Bob Montana
 Applid : 1027

You can view Bob Montana's profile from
http://adas0185.peoplesoft.com/psp/hc910tm1nt/EMPLOYEE/HRMS/c/HRS_HRAT.HRS_MANAGE_APP.GBL?Page=HRS_MANAGE_APP&Action=U&HRS_PERSON_ID=1027 page.

Thank You
 Betty Locherty

Forward Applicant Preview page

This page displays the message as it appears after the message that you enter is merged into the message template for forwarded email.

Rejecting Applicants

This section discusses how to reject applicants.

Pages Used to Reject Applicants

| Page Name | Definition Name | Navigation | Usage |
|------------------|------------------|---|---|
| Reject Applicant | HRS_GACT_APP_REJ | Recruiting, Find Applicants, Find Applicants Search for applicants, then in the Search Results grid, select <i>Reject Applicant</i> in the Take Action field or the Group Action field. (This action is also available on other pages.) | Update an applicant's disposition to show that the applicant has been rejected. |

Rejecting Applicants

Access the Reject Applicant page (on the Find Applicants page, select *Reject Applicant* in the Take Action field for an applicant)

Manage Applicant:

Reject Applicant

| Applicants Being Rejected | |
|---------------------------|---------------|
| Applicant | Name |
| 100202 | Rodney Clarke |

Select Status

Status Code: 110 Reject

Status Reason:

Reject Applicant page

Applicants Being Rejected

This grid lists the applicants who were selected when you performed the *Reject* action.

Select Status

- Status Code** If you use the delivered status definitions, the field displays *110 Reject*, which is the disposition that will be applied after you submit the status change.

- Status Reason** Select a reason for applying the *Reject* disposition.

- Submit and Cancel** Click the Submit button to complete the disposition update, or click the Cancel button to return to the Job Opening page without updating the applicant's disposition.

- Submit & Send Correspondence** Click to complete the disposition update and send correspondence to the rejected applicant.

Changing Applicant Statuses

This section discusses how to change applicant statuses.

Note. Applicant statuses are the statuses that you define for the Applicant recruitment area, which deals with the overall availability of the applicant. This differs from the applicant's disposition, which is the applicant's status relative to a particular job opening.

See Also

[Chapter 4, "Setting Up Recruiting Statuses," page 35](#)

Pages Used to Change Applicant Statuses

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|-----------------------------|------------------------|--|-------------------------------|
| Select New Applicant Status | HRS_GACT_RCM_STS | Recruiting, Find Applicants, Find Applicants Search for applicants, then in the Search Results grid, select <i>Change Applicant Status</i> in the Take Action field or the Group Action field. (This action is also available on other pages.) | Change an applicant's status. |

Changing Applicant Statuses

Access the Select New Applicant Status page (on the Find Applicants page, select *Change Applicant Status* in the Take Action field for an applicant).

The screenshot shows a web form titled "Change Applicant Status" with a sub-heading "Select New Applicant Status". The form contains a "Select Status" section with two dropdown menus. The first dropdown, labeled "*Status:", is currently set to "030 Inactive". The second dropdown, labeled "Reason:", is currently empty. Below the dropdowns are two buttons: "Submit" and "Cancel".

Select New Applicant Status page

Status Code Select a status code. The delivered statuses are *010 Active*, *020 Hired*, *030 Inactive*, and *040 Queued*. These are the status codes that are defined for the Applicant recruitment area on the Statuses and Reasons page.

Managing Applicant Lists

This section provides an overview of applicant lists and discusses how to:

- View existing applicant lists.
- Create applicant lists.
- Manage applicant lists.
- Edit primary applicant list data.
- Add applicants to an existing list.

Understanding Applicant Lists

Applicant lists are manually-constructed groups of applicants that recruiters can use to facilitate the recruiting process. Recruiters can add applicants to a list and then perform tasks for one, several, or all applicants on the list at the same time. For example, a recruiter can create a list of applicants to contact, a list of applicants that are hot prospects but for whom there is no current job opening, or a list of college students who expressed interest in employment during an on-campus recruiting event.

Lists can be public or private. The creator of an applicant list is the owner of the list. All recruiters and hiring managers have access to public lists. They can view public lists, take actions on the applicants in the lists, add applicants to the lists, and view primary list information, but they cannot make changes to the primary list information. Only the list owner can edit primary list information for public lists. For private lists, only the list owner can view and make changes to the lists.

Pages Used to Manage Applicant Lists

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|-------------------------------|------------------------|--|---|
| Applicant Lists | HRS_APPL_LIST | Recruiting, Applicant Lists, Applicant Lists | View existing applicant lists. |
| Create New List | HRS_CREATE_LIST | <ul style="list-style-type: none"> • Click the Create New List button on the Applicant Lists page. • Select <i>Create New List</i> in the Group Action field on the Applicant List page. • Recruiting, Find Applicants, Find Applicants <p>Search for applicants, then in the Search Results grid, select <i>Add Applicant to New List</i> in the Take Action field or the Group Action field.</p> <p>(This action is also available on other pages.)</p> | Create an applicant list. |
| Applicant List | HRS_LIST_MEMBER | Click a list name on the Applicant Lists page. | Manage an applicant list and its membership. |
| Edit Primary List Information | HRS_CREATE_LIST | Click the Edit Primary List Data link on the Applicant List page. | Edit information about the list such as its name and whether it is private or public. |

| Page Name | Definition Name | Navigation | Usage |
|-----------------------|-----------------|---|--|
| Select Applicant List | HRS_SELECT_LIST | <ul style="list-style-type: none"> Recruiting, Find Applicants, Find Applicants <p>Search for applicants, then in the Search Results grid, select <i>Add Applicant to Saved List</i> in the Take Action field or the Group Action field.</p> <p>(This action is also available on other pages.)</p> <ul style="list-style-type: none"> On the Applicant List page, select <i>Add to Another List</i> in the Group Action field. | Select the applicant list to which you want to add an applicant. |

Viewing Existing Applicant Lists

Access the Applicant Lists page (Recruiting, Applicant Lists, Applicant Lists).

Applicant Lists

Display: Only My Lists

| Applicant Lists | | | | |
|--------------------------------------|---------|--------------|----------------|--------|
| List | Access | Date Created | Owner | Delete |
| Excellent Applicants | Public | 2004-09-12 | Betty Locherty | |
| Good Prospects | Public | 2004-07-26 | Betty Locherty | |
| Inactive Applicants | Public | 2005-11-28 | Betty Locherty | |
| To Call List | Private | 2004-07-26 | Betty Locherty | |

Create New List
[Find Applicants](#)

Applicant Lists page

- Display** Select which applicant lists you want to view and click the Refresh icon to view those lists. Values are:
Only My Lists: Select to view only lists that you own.
All Lists: Select to view all public lists along with any private lists that you own.
- Find List and Go** Enter a partial or full list name to search for that list and click Go to display the search results.

List Details

- List** Click a link to access the Applicant List page, where you can view details for all applicants on the list.
- Access** Displays whether the list is public or private.
- Date Created and Owner** Displays the name of the user that created the list and the date that the list was created.

Page-Level Actions

- Create New List** Click this button to access the Create New List page so that you can create a new applicant list.
- Find Applicants** Click this link to navigate to the Find Applicants page, where you can search for applicants and use the *Add Applicant to New List* or *Add Applicant to Saved List* action to add the applicants to lists.

Creating Applicant Lists

Access the Create New List page (on the Applicant Lists page, click the Create New List button).

Create New List

Name Your New List

*List Name:

Description:

*Active:

Public

Create New List page

Name Your New List

List Name and Description

Enter identifying information about the new list. The name appears on the Applicant Lists and Applicant List pages; the description appears on the Edit Primary Applicant List Data page.

Active

Select *Active* or *Inactive*. When a list is inactive, only the list owner can view the list, even if it is a public list. You cannot add applicants to inactive lists.

Public

Select to make the list a public list. Deselect this check box if you want this list to be private.

Managing Applicant Lists

Access the Applicant List page (on the Applicant Lists page, click the Add Applicants button).

Applicant List: To Call List

| | | | |
|------------|----------------|-------------|------------|
| List Name: | To Call List | Access: | Private |
| Owner: | Betty Locherty | Created On: | 2004-07-26 |

[Add Applicants](#)
[Delete List](#)
[Edit Primary List Data](#)
[Previous](#) | [Next](#) | [Back to List](#)

Applicant List: To Call List

Find Applicant: [Go](#) [First](#) [Previous](#) | [Next](#) [Last](#)

| Applicants | Name | Applicant ID | Preferred Contact | Last Contacted | Contacted By | Delete |
|--------------------------|------------------------------------|--------------|--------------------------------------|----------------|----------------|--------|
| <input type="checkbox"/> | Diane Ironside | 280 | HCMGENUser1@ap6023fems.us.oracle.com | 07/25/2004 | Betty Locherty | |
| <input type="checkbox"/> | Cassandra Jacobson | 1021 | HCMGENUser1@ap6023fems.us.oracle.com | -- | | |

[Select All](#)
[Deselect All](#)
Select Action...
[Go](#)

[Add Applicants](#)
[Delete List](#)
[Previous](#) | [Next](#) | [Back to List](#)

Applicant List page

Add Applicants Click to access the Find Applicants page, where you can search for and select applicants to add to the list.

Delete List Click to delete the list. Only the list owner can delete the list.

Edit Primary List Data Click to access the Edit Primary List Information page, where you can change the list name, description, status, and availability (public or private).

Find Applicant and Go Enter the partial or full name of the applicant that you are searching for and click Go to display the search results.

Applicants

Name Click an applicant's name to access the Manage Applicant page for that applicant.

Preferred Contact Displays the email address, phone number, or mailing address of the applicant, depending on the applicant's preferred contact method. You can update an applicant's preferred contact method on the Manage Applicant page: Applicant Data tab: Contact section.

<Select Action> and Go Use the unlabeled group Action field at the bottom of the page to perform actions that relate to the overall applicant record (without regard to any particular job opening). Select an action to perform, then click the Go button to initiate the action.

In this context, the following actions are available: *Add Note, Add to Another List, Create New List, Forward Applicant, Link Applicant to Job, Route Applicant,* and *Send Correspondence.*

See [Chapter 19, "Managing Applicants," Summary of Action Availability, page 560.](#)

Editing Primary Applicant List Data

Access the Edit Primary List Information page (on the Applicant List page, click the Edit Primary List Data link).

Edit Primary List Information page

List Name and Description Enter identifying information about the new list. The name appears on the Applicant Lists and Applicant List pages; the description appears only on this page.

Active Select *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. Deselect this check box if you want this list to be private.

Adding Applicants to an Existing List

Access the Select Applicant List page (on the Find Applicants page, select *Add Applicant to Saved List* in the Take Action or Group Action field).

Select Applicant List page

Select List Select the applicant list to which you want to add the applicant. All public lists are available, as are private lists that the user owns.

Creating Applicant Checklists

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

Understanding Checklists

A checklist helps you remember all the details that you need to get applicants through recruiting and hire processes. You can use standard checklists that you create in the Checklist component, or you can create an individualized checklist for a particular applicant. When you hire an applicant, the checklists for that applicant are passed to PeopleSoft Enterprise Human Resources.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Setting Up the Administer Workforce Business Process," Creating Checklists

Pages Used to Create Applicant Checklists

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|---------------------|------------------------|---|--------------------------------------|
| Applicant Checklist | HRS_APP_CHKLIST | Recruiting, Find Applicants, Find Applicants Search for applicants, then in the Search Results grid, select <i>Manage Applicant Checklist</i> in the Take Action field. (This action is also available on other pages.) | Create a checklist for an applicant. |

Creating Applicant Checklists

Access the Applicant Checklist page (on the Find Applicants page, select *Manage Applicant Checklist* in the Take Action field).

Find Applicants

Applicant Checklist

Applicant Name: Jan Miller Applicant ID: 1

Applicant Type: External Applicant EmplID:

Find | View All First 1 of 1 Last

***Checklist Date:**

Checklist: Applicant Checklist

Responsible ID:

Comment:

| Checklist Item | | | | | Customize Find View All First 1-5 of 10 Last | |
|----------------|------------|------------------------------|------------------|--------------|--|---|
| *Sequence | *Item Code | Description | *Briefing Status | *Status Date | | |
| 1 | L00001 | Application Form Filled Out | Initiated | 06/09/2009 | + | - |
| 2 | L00002 | Resume on Hand | Initiated | 06/09/2009 | + | - |
| 3 | L00003 | Interview and Testing Set up | Initiated | 06/09/2009 | + | - |
| 4 | L00004 | References Contacted | Initiated | 06/09/2009 | + | - |
| 5 | L00005 | Verify Employment History | Initiated | 06/09/2009 | + | - |

[Return to Previous Page](#)

Applicant Checklist page

The fields on this page are a subset of those on the Employee Checklist page in PeopleSoft Enterprise Human Resources Administer Workforce.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Increasing the Workforce," Creating a Person Checklist.

Adding Persons of Interest

This section provides an overview of persons of interest and discusses how to:

- Select person of interest types and add persons of interest.
- View Search/Match results.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Search/Match"

Understanding Persons of Interest

Many organizations must add applicants to the human resources system as persons of interest before the applicants are actually hired. For example, you might want to add an applicant to the system as an external trainee so that you can enroll the applicant in training prior to being hired. When you add an external applicant as a person of interest, the system adds the applicant to the human resources system and assigns human resources ID to the applicant.

To add an applicant as a person of interest, use the *Add Person of Interest* action. This action is available only for external applicants. You cannot add internal applicants (employees or non-employees) as persons of interest because they already exist in the HR system.

Depending on whether the Person of Interest field on the Recruiting Installation - Applicants page is set to *Yes* or *No*, you may be required to check whether the applicant is already in the human resources database. When checking is required, submitting an applicant as a person of interest causes the system to search the HR system and display a list of potential matches. You review this list and, if you find a true match, you identify the record so that the system can associate the applicant with the existing record rather than creating a new record.

See [Chapter 2, "Defining Installation Options for Recruiting," Defining Applicant-Related Settings, page 17.](#)

After you add an applicant as a person of interest, you can confirm the transaction by verifying that the system has added an EmplID field to the Manage Applicant page: Applicant Data tab: Contact section.

Pages Used to Add Persons of Interest

| Page Name | Definition Name | Navigation | Usage |
|------------------------|------------------------|---|--|
| Add Person of Interest | HRS_ADD_EXT_TRN | Recruiting, Find Applicants, Find Applicants Search for applicants and click an applicant name to access the Manage Applicant page. On the Manage Applicant page, select <i>Add Person of Interest</i> in the Take Action field at the top of the page, then click the Go button. | Select the person of interest type for the applicant and submit the applicant to the human resources system. |

| Page Name | Definition Name | Navigation | Usage |
|----------------|-----------------|--|--|
| Search Results | HCR_SM_RESULTS | <p>Click the Submit button on the Add Person of Interest page.</p> <p>The Search Results page appears if the system is configured to search the system to see if the person you are adding already exists in the system.</p> | View Search/Match results and investigate potential matches. |

Selecting Person of Interest Types and Adding Persons of Interest

Access the Add Person of Interest page (on the Manage Applicant page, select *Add Person of Interest* in the Take Action field at the top of the page, then click the Go button).

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 9.1 Application Fundamentals PeopleBook*, "Setting Up Organization Foundation Tables," Setting Up Person of Interest Types.

Viewing Search/Match Results

Access the Search Results page (click the Submit button on the Add Person of Interest page).

See [Chapter 16, "Hiring Applicants," Reviewing Search/Match Results, page 512.](#)

Processing Duplicate Applicants

This section provides an overview of duplicate applicant processing and discusses how to:

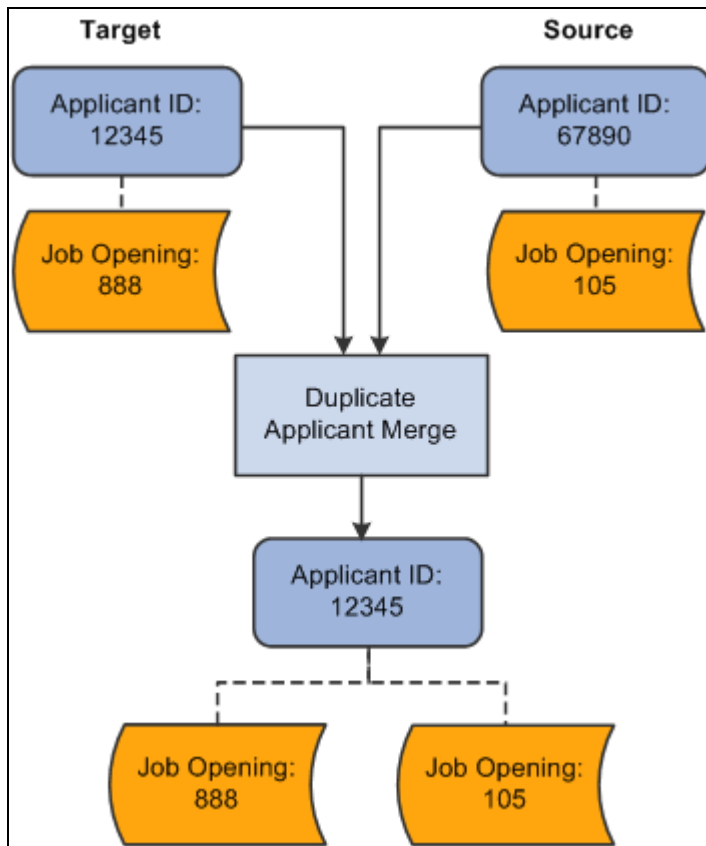
- Initiate duplicate applicant processing.
- Define search criteria and running the Find Applicant Duplicates process.
- Identify and merge duplicate applicant records.
- Manually merge applicants from the target record.
- Manually merge applicants from the source record.

Understanding Duplicate Applicant Processing

Sometimes an applicant has more than one record, each with its own applicant ID. Duplicate applicant records can occur when applicants register in Candidate Gateway more than once or when they submit their applications using different methods.

Duplicate applicant records are confusing for hiring managers and recruiters. Talent Acquisition Manager provides processes to help recruiters identify and merge the duplicate applicant records into one applicant record. The system also has a mechanism for manually merging specific applicants that you've already identified.

This diagram illustrates the process of merging duplicate records. In the diagram, there are initially two different applicant IDs representing the same applicant. One record is marked as the *Target* record; this record will be updated with data from the other records and will remain active after the merge process. The other record is marked as the *Source* record; its data will be copied over to the target record and it will become inactive after the merge process. Each record is associated with a different job opening. When the records are merged, the surviving applicant record is automatically associated with both job openings.



The Applicant Merge process joins multiple applicant and relates all associated job openings to the surviving applicant.

Processes for Managing Duplicate Records

The system provides two Application Engine processes that work together to help you manage duplicate records:

- The Find Applicant Duplicates (HRS_DUP_PRC) process uses search criteria that you specify to find potential duplicates.

For example, if you search on first and last name, the process results will include groups of potential duplicates whenever there are multiple applicants with the same first and last name. The process does *not* automatically merge these potential duplicates; you must review the results and identify targets and sources when you determine that there is, in fact, duplication.

- The Duplicate Applicant Merge process (HRS_DUPE_MRG) completes the data merge for the records that you have marked.

To use these processes for duplicate applicant processing:

1. Access the Process Duplicate Applicants page (Recruiting, Administration, Process Duplicate Applicants, Process Duplicate Applicants).

This page lists previous instances of the Find Applicant Duplicates process. All instances except the most recent have a *Closed* status, and the most recent instance will automatically be closed when you create a new instance.

2. Click the Create New Search button to access the Find Duplicate Applicants page, where you specify criteria to be used in identifying potential duplicates.
3. Select your search criteria and click the Run button to initiate the Find Applicant Duplicates process.

This process finds potential duplicate applicant records that match the search criteria that you define. Email, address, and middle name searches are case-sensitive. The process runs against active applicant records only.

For the system to consider two applicants a match, all search criteria that you define on the Find Duplicate Applicants page must match exactly. Records with duplicate email addresses, phone, and national ID numbers, regardless of type, are identified as potential duplicate records. For example, if one applicant record has a home email address that matches the business email address from another applicant record, the system counts this as a potential match regardless of the fact that the address types are different.

4. Return to the Process Duplicate Applicants page and click the View Duplicates link to access the Review Duplicate Applicants page, then review the process results and identify records to merge.

The system groups each set of potential duplicate applicants into duplicate sets. If you determine that the applicants in a duplicate set are in fact duplicates, identify which applicant records will survive the merge and mark them as target records. Mark records that are to be merged into the target as source records, and explicitly identify the matching target record. For each duplicate set, there can be multiple source and target records.

To determine which records should be merged, you might need to review detailed information about a record. To do this, click the applicant record ID to access the Manage Applicant page.

5. Click the Run button on the Review Duplicate Applicants page to run the Duplicate Applicant Merge process and complete the merge for any records that you have marked for merging.

If you return to the Review Duplicate Applicants page after the process is complete, the merged applicant records are read-only. Unmerged applicant records, however, are still editable. You can continue to identify target and source records and run the Duplicate Applicant Merge process as long as there are still unmerged applicants on the page.

Manual Merges

If you have already identified duplicate records, you can manually merge them without running the search process that finds potential duplicates for you. To do this, access the Manage Applicant page for one of the duplicate records, then use the Take Action field to initiate the merge. There are two merge actions available:

- *Merge as Target* uses the current applicant record as the target and opens the Merge as Target page where you identify one or more sources records before completing the merge.
- *Merge as Source* uses the current applicant record as the source and opens the Merge as Source page where you identify the target record before completing the merge.

Note. Manual merges also use the Duplicate Applicant Merge Application Engine process (HRS_DUPE_MRG), however, you do not use the Process Scheduler Request page to initiate the process. Rather, the system automatically initiates the process when you click the Merge button.

Data Merging

When you merge applicant records, the following data changes occur:

- The status for the non-surviving applicant records is set to the status entered in the Inactive State for Duplicates field on the Recruiting Installation - Applicants page.

See [Chapter 2, "Defining Installation Options for Recruiting," Defining Applicant-Related Settings, page 17.](#)

- The system updates the target record with the most current contact information (first name, middle name, last name, address, phone numbers, email addresses) and identity and eligibility data.

If there is no data on the target record, but there is data on the source record, the system uses the data on the source record to update the target record. If data on the source and target records has the same effective date, the system does not change the data on the target record.

- All unique recruitment rows from the source records are added to the target record so that there is no loss of data.

This includes interview schedules, interview evaluations, contact notes, expenses, interested parties, references, and referral sources.

Note. If you merge records for internal applicants (employees and non-employees), the system deletes or modifies the applicant record only. Information held in Personal Data tables is never modified or deleted.

Pages Used to Process Duplicate Applicants

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|------------------------------|------------------------|--|--|
| Process Duplicate Applicants | HRS_DUPE_PRCS | Recruiting, Administration, Process Duplicate Applicants, Process Duplicate Applicants | Create new instances of the duplicate applicant search process and access the results of those searches. |
| Find Duplicate Applicants | HRS_DUPE_FIND | <ul style="list-style-type: none"> • Click the Create New Search button on the Process Duplicate Applicants page. • Click a link in the Status column on the Process Duplicate Applicants page. | Select fields for duplicate matching and initiate the process of searching for duplicates. |
| Review Duplicate Applicants | HRS_DUPE_REVIEW | <ul style="list-style-type: none"> • Click the View Duplicates link on the Process Duplicate Applicants page. • Click the Merge Applicants link on the Screen Applicants page or on the Screening Results page | Review the results of the process that searches for duplicate applicants, identify records to merge, and initiate the merge process. |

| Page Name | Definition Name | Navigation | Usage |
|-----------------|-----------------|---|--|
| Merge As Target | HRS_APP_MERGE | <p>Recruiting, Find Applicants, Find Applicants</p> <p>Click an applicant name to access the Manage Applicant page.</p> <p>On the Manage Applicant page, select <i>Merge As Target</i> in the Take Action field at the top of the page, then click the Go button.</p> | Merge the applicant record with one or more other applicants that you identify. The applicant whose record you use to initiate the action will be the surviving applicant. |
| Merge As Source | HRS_APP_MERGE | <p>Recruiting, Find Applicants, Find Applicants</p> <p>Search for applicants and click an applicant name to access the Manage Applicant page.</p> <p>On the Manage Applicant page, select <i>Merge As Source</i> in the Take Action field at the top of the page, then click the Go button.</p> | Merge the applicant record with a target applicant that you identify. The target applicant will be the surviving applicant. |

Initiating Duplicate Applicant Processing

Access the Process Duplicate Applicants page (Recruiting, Administration, Process Duplicate Applicants, Process Duplicate Applicants).

Process Duplicate Applicants

▼ Select to View Instruction

To process duplicate applicants, select or create a search and select the fields you would like to use for comparison of applicant records. If the data in the selected fields matches for two or more records, the records will be flagged as possible duplicates and the results returned to you for determination and further action.

Create New Search
Refresh

| Review Duplicate Processes | | | |
|----------------------------|-----------------------|------------------------------------|---------------------------------|
| Run Control ID | Last Updated | Status | View Duplicates |
| HRS_DUPE_FIND_2 | 08/19/2009 11:03PM | Search Requested | View Duplicates |
| HRS_DUPE_FIND_1 | 05/01/2006 3:41PM | Review in Progress | View Duplicates |

Process Duplicate Applicants page

Page-Level Actions

- Create New Search** Click this button to access the Find Duplicate Applicants page, where you can select new duplicate applicant search criteria and run the Find Applicant Duplicates process.
- Refresh** Click to refresh the status links with the current status of the process.

Review Duplicate Processes

Status Displays the status of the process instance. Click a status link to access the Find Duplicate Applicants page, where you can review the duplicate applicant search criteria used for the process.

Values are:

- *Search Requested:* Indicates that the Find Applicant Duplicates process has been initiated.
- *Search In Progress:* Indicates that the Find Applicant Duplicates process is running.
- *Search Completed:* Indicates that the Find Applicant Duplicates process is complete but that the results have not been reviewed.
- *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.
- *Merge Completed:* Indicates that the Duplicate Applicant Merge process has finished running.

You can continue run the merge process on additional sets of duplicate records.

- *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.

View Duplicates Click to access the Review Duplicate Applicants page, where you can identify duplicate sets and merge duplicate applicant records. This link appears after the Find Applicant Duplicates process is complete.

Defining Search Criteria and Running the Find Applicant Duplicates Process

Access the Find Duplicate Applicants page (on the Process Duplicate Applicants page, click the Create New Search button or click a link in the Status column).

Note. Once you initiate the Find Applicant Duplicates process, this page becomes read-only. You must then create a new search to establish new search criteria.

Process Duplicate Applicants

Find Duplicate Applicants

Run Control ID: HRS_DUPE_FIND_2 [Report Manager](#) [Process Monitor](#)

- First Name
- Middle Name
- Last Name
- Second Last Name
- Alternate Character Name

- Phone
- Email
- Date of Birth
- Gender
- National ID

Find Duplicate Applicants page (1 of 2)

| |
|--|
| <input type="checkbox"/> Address Line 1 |
| <input type="checkbox"/> Address Line 2 |
| <input type="checkbox"/> Address Line 3 |
| <input type="checkbox"/> Address Line 4 |
| <input type="checkbox"/> City |
| <input type="checkbox"/> County |
| <input type="checkbox"/> Postal Code |
| <input type="checkbox"/> State |
| <input type="checkbox"/> Country |
| <input type="checkbox"/> Address Field 1 |
| <input type="checkbox"/> Address Field 2 |
| <input type="checkbox"/> Address Field 3 |
| <input type="checkbox"/> Number 1 |
| <input type="checkbox"/> Number 2 |
| <input type="checkbox"/> House Type |
| <input type="checkbox"/> In City Limit |
| <input type="checkbox"/> Tax Vendor Geographic |
| <input type="checkbox"/> Alternate Character Address 1 |
| <input type="checkbox"/> Alternate Character Address 2 |
| <input type="checkbox"/> Alternate Character Address 3 |
| <input type="checkbox"/> City Alternate Character |

Find Duplicate Applicants (2 of 2)

Select the data that must be identical for applicants to be considered as duplicates.

Note. Email, address, and middle name searches are case-sensitive. Records with duplicate email addresses, phone, and national ID numbers, regardless of type, are identified as potential duplicate records. For example, if one applicant record has a home email address that matches the business email address from another applicant record, the system counts this as a potential match regardless of the fact that the address types are different.

When you first access this page for new duplicate processing, the search settings are copied from the settings for the previous search.

Click the Run button to access the Process Scheduler Request page, where you initiate the duplicate search process.

See Also

Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications

Identifying and Merging Duplicate Applicant Records

Access the Review Duplicate Applicants page (on the Process Duplicate Applicants page, click the View Duplicates link).

Process Duplicate Applicants

Review Duplicate Applicants

Run Control ID: HRS_DUPE_RWW_2_1 [Report Manager](#) [Process Monitor](#)

Duplicate Review Find | View All | First 1 of 50 | Last

Duplicate Set ID: 1 Duplicate Set Status: No Merges

Review Duplicate Applicants

| Applicants | Relationship | Target | First Name | Last Name | Address Line 1 | City | State | Country | Postal Code |
|--------------------|--------------|-------------------|------------|-----------|------------------|----------|-------|---------|-------------|
| 2 | Target | | Jan | Bradley | 1923 Roble Road | Berkeley | CA | USA | 94706 |
| 72 | Source | 2 | Jan | Bradley | 382 Hayes Street | New York | NY | USA | 10023 |

[Return to Main Page](#)

Review Duplicate Applicants page

Run

After you have reviewed potential duplicates and identified records that you want to merge, click the Run button to initiate the Duplicate Applicant Merge process and complete the merge for the indicated records.

You can process subsets of the potential duplicates. For example, you can run the process for the first 10 duplicate sets and then the rest at a later time.

Note. After you start the Duplicate Applicant Merge process, you cannot cancel it. You must be certain that you want to merge the applicant records before you schedule the process.

Duplicate Review

Use this group box to specify how the system merges duplicate applicant records. Applicants with matching data are grouped into duplicate sets. Review each set and decide if the applicant records are duplicates.

Duplicate Set ID

Displays the ID number for the duplicate set. Refer to the group box header to see how many total duplicate sets exist.

Duplicate Set Status

Displays the status of the merge process. Values are:

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 in the duplicate set.

Review Duplicate Applicants

Applicants

Click the applicant ID link to access the Manage Applicant page, where you can view additional details for the applicant. (On the Manage Applicant page, clicking the Applicant List link returns you to the Review Duplicate Applicants page.)

Relationship Specify how the applicant records are merged. Values are *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 and merge the applicants.

Leave these fields blank if you determine that the applicants in a duplicate set are not duplicates or if you have not yet made a determination.

Target Select the target for each source record. The drop-down list box lists the applicant IDs for applicants in the same duplicate set who have been identified as targets.

This column appears on the page only after you select *Source* in the Relationship column for an applicant.

Manually Merging Applicants from the Target Record

Access the Merge As Target page (on the Manage Applicant page, select *Merge As Target* in the Take Action field at the top of the page, then click the Go button.)

Manage Applicant: Jan Bradley

Merge As Target

Name: [Jan Bradley](#) **Applicant Type:** External Applicant

Applicant ID: 2

Contact: Phone **Status:** 010 Active

Phone: 510/562-2333 **Address:** 1923 Roble Road

Email: HCMGENUser1@ap6023fems.us.oracle.com Berkeley, CA 94706

Target Person: 2 Jan Bradley

| Sources to Merge | | | |
|------------------|--------------|---|---|
| Person ID | Display Name | | |
| 72 | Jan Bradley | + | - |

[Return to Previous Page](#)

Merge As Target page

Person ID Identify one or more applicant records that will be merged into the current record.

Merge Click to run the Duplicate Applicant Merge process and complete the merge.

Manually Merging Applicants from the Source Record

Access the Merge as Source page (on the Manage Applicant page, select *Merge As Target* in the Take Action field at the top of the page, then click the Go button.)

Manage Applicant: Jan Bradley

Merge as Source

Name: [Jan Bradley](#) **Applicant Type:** External Applicant

Applicant ID: 2

Contact: Phone **Status:** 010 Active

Phone: 510/562-2333 **Address:** 1923 Roble Road

Email: HCMGENUser1@ap6023fems.us.oracle.com Berkeley, CA 94706

Target Person:  Jan Bradley

| Sources to Merge | |
|------------------|--------------|
| Person ID | Display Name |
| 2 | Jan Bradley |

[Return to Previous Page](#)

Merge as Source page

Target Person Identify the applicant record into which the current record will be merged.

Merge Click to run the Duplicate Applicant Merge process and complete the merge.

Using the Job Search Agent

This section provides an overview of the Job Agent (HRS_JOB_AGNT) Application Engine process and discusses how to run the Job Agent process.

See Also

PeopleSoft Enterprise Candidate Gateway 9.1 PeopleBook, "Using Candidate Gateway," Reviewing and Searching for Job Postings

Understanding the Job Agent Process

Job Agent functionality enables the system to notify applicants of job postings that meet the applicants' saved criteria.

Applicants establish their criteria in Candidate Gateway by saving searches with the criteria for the types of jobs in which they are interested in applying. These saved searches are processed whenever an administrator runs the Job Agent (HRS_JOB_AGNT) process.

During the Job Agent process, the system:

1. Deleted expired job search agents in HRS_AGNT_PROF.

The system determines whether the job search agent has expired by taking the date that the job agent was created and adding the number of days that you enter in the Days Job Search Agent Active field on the Recruiting Installation - Applicants page. The process compares the resulting date to the system date. If the resulting date is less than the system date, the system deletes the job search agent.

See [Chapter 2, "Defining Installation Options for Recruiting," Defining General Settings for Templates, Approvals, and Integrations, page 11.](#)

2. Searches for job postings that match the job agent search criteria, and writes the results to a file called HRS_AGNT_RSLT.

In addition to meeting the applicant's search criteria, job postings must meet certain general requirements:

- The job opening status is *Open*.
- The posting destination is a *Company* type recruitment source.
- The posting type, *External* or *Internal*, is correct for the applicant who created the job agent.
- There is at least one section of the posting that is visible to the applicant who created the job agent.

Each section of a job posting has a visibility of *Internal Only*, *External Only*, or *Internal and External*.

3. Posts a notification in the Notifications grid on the Careers Home page in Candidate Gateway.

Applicants can click on the subject link for the notification to view the message, which contains links to the job postings that meet the applicant's criteria.

If the applicant has multiple job search agents, the system posts a separate notification for one.

4. Sends the applicant an email notification using the JobAgentNotification template.

This occurs only if the applicant's contact information includes an email address. The email includes links to the job openings that match the applicant's criteria, up to the maximum number of job openings specified in the Max Job Posts Per Notification field in the Recruiting Installation - Jobs page. If the number of matches exceeds the maximum, the notification email also directs the applicant to visit Candidate Gateway to access complete search results.

Prerequisites

Enter values for these fields in the Recruiting Installation component:

- Max Job Posts per Notification (Recruiting Installation - Jobs page).
- Days Job Search Agent Active (Recruiting Installation - Applicants page).
- Maximum Job Agents (Recruiting Installation - Applicants page).

See [Chapter 2, "Defining Installation Options for Recruiting," Apply Online, page 19.](#)

Page Used to Run the Job Agent Process

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|------------------|------------------------|--|----------------------------|
| Job Search Agent | HRS_RUN_JOBAGNT | Recruiting, Administration, Run Job Search Agent, Job Search Agent | Run the Job Agent process. |

Running the Job Agent Application Engine Process

Access the Job Search Agent page (Recruiting, Administration, Run Job Search Agent, Job Search Agent).

This run control page does not have any parameters.

Click Run to access the PeopleSoft Process Scheduler Request page, where you schedule the Job Agent process.

Note. Best practice is to set up the request so that the Job Agent process runs at regular intervals.

See Also

Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications

Generating Applicant Reports

This section lists the pages used to generate certain applicant-related reports.

See Also

[Appendix C, "PeopleSoft Talent Acquisition Manager Reports," page 717](#)

Pages Used to Generate Applicant Related Reports

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|-----------------------------|------------------------|---|--|
| Applicant Listing | PRCSRUNCNTL_LC_HR | Recruiting, Reports, Applicant Listing, Applicant Listing | Generate an Applicant Listing report, which you can use to view job opening information with a list of the candidates being interviewed for the positions. The report groups job openings by department ID. |
| Applicant Summary by Job | PRCSRUNCNTL_LC_HR | Recruiting, Reports, Applicant Summary by Job, Applicant Summary by Job | Generate the Applicant Summary by Job report, which you can use to view the number of applicants and percentage of total applicants that applied to a job opening, sorted by source type and specific source. |
| Applicant Summary by Source | PRCSRUNCNTL_LC_HR | Recruiting, Reports, Applicant Summary by Source, Applicant Summary by Source | Generate the Applicant Summary by Source report, which you can use to view the number of applicants and percentage of total applicants sorted by source type and specific source (regardless of job opening). |
| Job Group Movement Analysis | RUN_CNTL_REG_INTRO | Recruiting, Reports, Job Group Movement Analysis, Job Group Movement Analysis | Generate the Job Group Movement Analysis report, which you can use to generate racial and gender demographic data regarding the hiring process. This report provides an analysis of the number of males and females by ethnic group who were applicants, hires, promotions, or terminations during a specified time period. The report shows which sex and ethnic groups are moving in and out of the organization and which groups are offered opportunities for advancement. |

Chapter 20

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 8, "Setting Up Recruitment Sources and Third Party Integrations," Setting Up Resume Email Accounts, page 176.](#)

Resume Load Process Application Engine Process (HRS_RESLOAD)

The Resume Load Process enables organizations to load resumes that it receives.

See [Chapter 20, "Managing Resumes," Loading Resumes, page 640.](#)

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 8, "Setting Up Recruitment Sources and Third Party Integrations," Setting Up Recruiting Vendors, page 158.](#)

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 8, "Setting Up Recruitment Sources and Third Party Integrations," Setting Up Recruitment Sources, page 181.](#)

Apply Online

Internal and external applicants can use PeopleSoft Enterprise Candidate Gateway to apply for job openings online.

See *PeopleSoft Enterprise Candidate Gateway 9.1 PeopleBook*, "Using Candidate Gateway," Applying for Jobs.

Add New Applicant Component

Recruiters and hiring managers can enter applicant data manually by using the Add New Applicant component.

When recruiters and hiring managers manually enter data for an applicant, they have the option to attach a resume. The data in the resume is not extracted or used to automatically populate fields in the Add New Applicant component. However, the creation of these applicants is tracked in the Manage Resumes component.

See [Chapter 11, "Entering Applicant Data," page 299](#).

Understanding the Resume Extraction Process

Resume extractors extract data from applicant resumes and move the data into Recruiting Solutions tables. Organizations can use multiple resume extractors. For example, you can use a different resume extractor for each country in the organization, or you can use different resume extractors for each recruitment source from which you receive resumes.

The resume extractor that the system selects to use depends on the resume extractor that you specify for a recruitment source, a site, or the extractor that you specify when you run the Resume Load Process or run an extraction from the Manage Resumes (HRS_AL_LOG) component. If an applicant attaches their resume to their online application in Candidate Gateway, the system uses the resume extractor that is specified on the Site - Setup Site page for that online application site. If the resume comes from a specific recruitment source; for example, a recruiting agency, the system uses the resume extractor that you specified in the Source Setup component when you set up the recruitment source. When you load resumes by using the Resume Load Process, you select which extractor to use when you run the process.

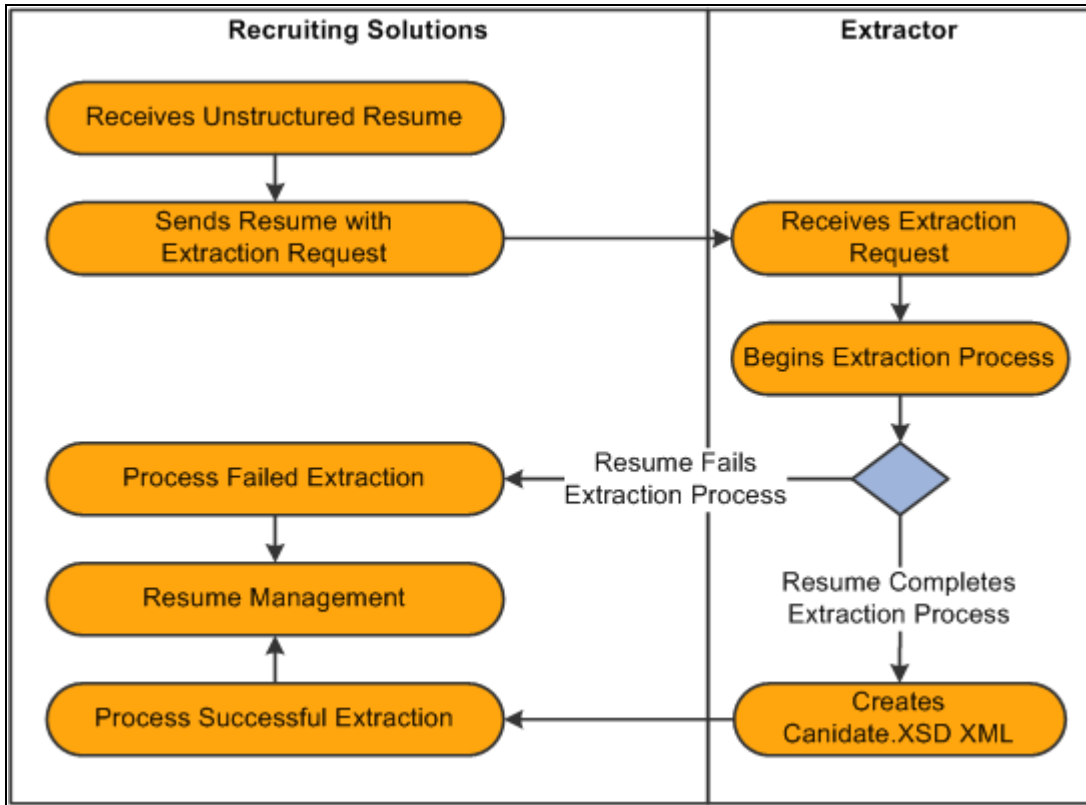
Resume extractors extract data from an applicant's resume. Not all extractors extract the same data. PeopleSoft software supports the following data from the extractors:

- Contact information: applicant name, home address, telephone numbers, and email address.
- Prior work experience.
- Secondary education.
- Qualifications including licenses and certificates, languages, memberships, honors and awards, and competencies.
- Referrals.
- Full resume text.

Upon successful extraction, the system creates a record for the applicant in the Manage Applicant component, and populates fields in the Manage Applicant component for the applicant. The system also assigns the applicant an applicant ID, a status, a resume name, adds the original resume as an attachment, and associates any job openings that might be applicable. If the applicant attaches a resume when they apply online through Candidate Gateway, the resume extractor populates fields in the applicant's online application and referrals. Of course, this presumes that the extractor actually extracted this data.

Note. The resume extraction process isn't required for applicants to apply for job openings online by using Candidate Gateway.

This process flow shows the resume extraction process starting with receipt of an unstructured resume and ending when the results of the successful or failed extraction are saved to the resume management tables in PeopleSoft Recruiting Solutions.



Resume extraction process showing tasks performed within PeopleSoft Recruiting Solutions and tasks performed by the extractor

Understanding Resume Statuses

The system assigns a status, or resolution state, to each resume that it receives. For resumes from recruitment sources that are a Vendor type, the system uses the settings that you define on the Vendor page in the Source Setup component to determine which status to assign to the resume. For the Resume Load Process, the system uses the run parameters that you set up to determine what statuses to assign.

The resume status of a resume is different than the extraction status of the resume. The extraction status of a resume can be either Success or Fail. In general, a resume that fails an extraction process is automatically set to either a Rejected or Unresolved resume status, and resumes that are successfully extracted are set to either a Success or Draft resume status, depending on the business rules that you set up for the recruitment source or the parameters that you select when you run the Resume Load Process.

When the system receives a resume through OIF, the resume extraction process might not be involved. However, the resume status is still applicable. For example, if the system receives a Candidate-XML message directly from a recruiting agency through OIF that is already parsed (extracted), the system does not send it to a resume extractor. However, the system does run the resume through the autoscreening rules that an organization sets up for the recruitment source.

This table describes resume statuses:

| Resume Status | Description | Default Applicant Status |
|----------------------|---|--|
| Awaiting Resolution | Indicates that the resume is in the database but has not yet been processed through a resume extractor. | Not applicable. Applicant data is not created until the resume is extracted. |
| Unresolved | Indicates that the resume requires an administrators attention to move the resume into a Rejected or a Success resume status. Resumes in the Unresolved state can be reprocessed through an extractor, the associated applicant data for these resumes can be manually modified, and then the administrator can set the resume to a Success or Reject status. | Queued |
| Rejected | Indicates that the system rejected the resume and has set the associated applicant's status to Inactive if the system created an applicant. A resume can be rejected for several reasons. PeopleSoft software supports two types of automatic rejection. First, resumes that are not successfully extracted can automatically be set to the Rejected status. Second, the autoscreening setup for the recruitment source can determine that a resume/applicant fails the Rejected status autoscreening definition and automatically set the resume status to Rejected. Finally, a user can manually set the resume status to Rejected from the Manage Resumes component. | Inactive |

| Resume Status | Description | Default Applicant Status |
|----------------------|--|---------------------------------|
| Draft | Indicates that the resume requires the associated applicant's attention to move the resume into a Success state. The associated applicant's status is set to Queued. Resumes in the Draft state can be reprocessed through an extractor, the associated applicant data for these resumes can be manually modified, and then the administrator can set the resume to a Success or Reject status. Assigning a Draft status typically requires that the applicant validate their extracted resume data via the online application pages in Candidate Gateway. When the applicant submits the corresponding resume online, the status is updated to Success. If applicants do not validate their resume data, the resume stays in Draft status unless an administrator intervenes. | Queued |
| Success | Indicates that the resume is successfully extracted and the resume's associated applicant has been set to Active and is ready to continue through the recruitment business processes. When an applicant uses the resume extraction process through Candidate Gateway when they apply for jobs online, the resume status for that resume defaults to Success. | Active |

See [Chapter 8, "Setting Up Recruitment Sources and Third Party Integrations,"](#) Defining Settings for Vendor Recruitment Sources, page 189.

Loading Resumes

This section provides an overview of the Resume Load Process, lists prerequisites, and discusses how to load resumes.

Understanding the Resume Load Process (HRS_RESLOAD)

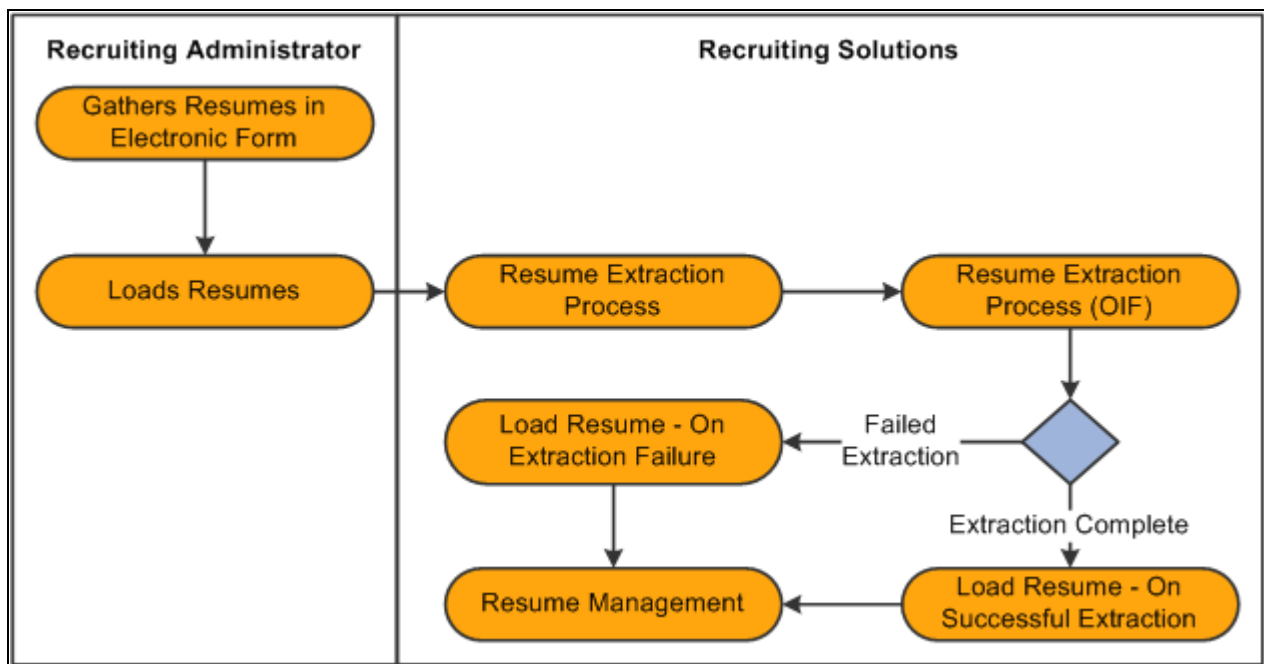
The Resume Load Process enables organizations to load resumes that it receives in electronic formats. The electronic formats that the system can accept are limited only by the resume extractor that you select to use for the process. You can also use the Resume Load Process to upload paper resumes that you receive, after you transform the paper resumes into an electronic format.

When you set up the process you can specify the resume extractor that you want the system to use, parameters for the resume extractor, the site ID to which you want to redirect applicants, the source to which you want to associate resumes, the statuses that you want to assign to the resumes upon a failed or successful extraction, and the job openings that you want to associate to the applicants. You must browse for and upload the resumes that you want to use in the process. You can upload individual resume documents, or you can upload a zip file that contains multiple resumes.

When you run the process, the system sends the resumes to the resume extractor to parse. After the Resume Load Process completes, you can use the Manage Resumes component to view the status of each of the resumes.

See [Chapter 20, "Managing Resumes," Managing Resumes, page 645.](#)

This diagram shows the Resume Load Process from the time a recruiting administrator gathers resumes in electronic form and ending when the results of the successful or failed extraction are saved to the resume management tables in PeopleSoft Recruiting Solutions.



Resume Load Process for loading electronic resumes into resume management tables

Prerequisites

Before you can load resumes using the Resume Load Process, you must:

- Set up resume extractor vendors.

See [link to resume extractor vendor setup in TAM](#)

- Set up site IDs.

See [Chapter 6, "Setting Up Additional Recruiting Definitions," Setting Up Sites, page 90.](#)

- Set up sources and subsources if you want to associate the resumes with a source.

See [Chapter 8, "Setting Up Recruitment Sources and Third Party Integrations," Setting Up Recruitment Sources, page 181.](#)

- Create job openings if you want to associate applicants with a job opening.

See [Chapter 10, "Creating Job Openings," Entering Primary Job Opening Information, page 215.](#)

Page Used to Load Resumes

| Page Name | Definition Name | Navigation | Usage |
|---------------------------------------|-----------------|--|---------------|
| Load Resume - Prepare Load Parameters | HRS_RESLOAD | Recruiting, Administration, Load Resume, Load Resume - Prepare Load Parameters | Load resumes. |

Loading Resumes

Access the Load Resume - Prepare Load Parameters page (Recruiting, Administration, Load Resume, Load Resume - Prepare Load Parameters).

Load Resume

Prepare Load Parameters

Load Parameters

Basic Information

*Resume Load Description:

Resume Load Status:

Comments:

Extractor:

Site ID:

Country:

Language:

*On Successful Extraction:

*On Extraction Failure:

Run Control ID: [Process Monitor](#)

Load Resume - Prepare Load Parameters page (1 of 2)

| Resume Source | |
|---|---------------|
| Source | SubSource |
| Magazines | Other |
| | |
| Job Openings Customize Find First 1 of 1 Last | |
| Job Opening ID | Posting Title |
| | |
| Resumes | |
| Resumes | Status |
| Attached File | Awaiting Load |
| <input type="button" value="Add Multiple Resumes"/> <input type="button" value="Add Resume"/> | |
| <input type="button" value="Load Resume"/> | |

Load Resume - Prepare Load Parameters (2 of 2)

Basic Information

Use this group box to specify basic load parameters for the Resume Load Process. The system remembers the settings that you specify in this group and uses the settings for the next process, except for the value in the Resume Load Description field, which is dynamic, and the Comments field. You can change the defaulted load parameters each time that you run process.

Resume Load Description

The system populates this field with the user ID of the person logged in to the system along with the current date and time. You can edit the description if needed.

Resume Load Status

Displays the status of the Resume Load Process. Values are:

In Preparation: Indicates that the process has not started. The system displays this status until you click the Load Resumes button.

Load in Progress: Indicates that the process is in progress. The system displays this status after you click the Load Resumes button and before the process completes.

Loaded: Indicates that the process is complete. The system displays this status after all resumes are processed.

Comments

Enter comments. These comments appear only on this page and are used only for informational purposes.

Extractor

Select the resume extractor that you want the system to use. Only active vendors from the ResumeExtractor transaction group appear in this prompt. Define vendors by using the Vendor Setup (HRS_VENDOR_SETUP) component.

| | |
|---|--|
| Site ID | Select a site ID where you want to redirect applicants. Define sites on the Site - Site Setup page. |
| Country | Select a country. Some resume extractors require a country to begin the extraction process. |
| Language | Select the language in which the resumes are written. This is an optional field. Some resume extractors use this language for the extraction process, however, other extractors ignore this field. |
| On Successful Extraction | <p>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:</p> <p><i>Set to Draft:</i> Select to set the status of successfully extracted resumes to Draft.</p> <p><i>Set to Success:</i> Select to set the status of successfully extracted resumes to Success.</p> |
| On Extraction Failure | <p>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:</p> <p><i>Reject Resume:</i> Select to set the status of resumes that failed to extract to Rejected.</p> <p><i>Set to Unresolved:</i> Select to set the status of resumes that failed to extract to Unresolved.</p> |
| 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 | <p>Displays the status of each resume. Values are: <i>Awaiting Load</i>, <i>Draft</i>, <i>Success</i>, <i>Rejected</i>, and <i>Unresolved</i>. <i>Awaiting Load</i> appears for all resumes until the Resume Load Resume process completes. When the process completes the system assigns a status to each resume based on the status values that you specify in the On Successful Extraction and On Extraction Failure fields.</p> <p>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.</p> |

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 20, "Managing Resumes," Understanding Resume Management, page 635](#).

Pages Used to Manage Resumes

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|--|------------------------|---|---|
| Manage Resumes - Select Resume | HRS_AL_LOG | Recruiting, Administration, Manage Resumes, Manage Resumes - Select Resume | Manage resumes. |
| Resume Management Details | HRS_AL_LOG_DETAILS | Click the Details link for an applicant in the Search Results group box on the Manage Resumes - Select Resume page. | View details for resumes. |
| Open Integration Framework - Integration Log | HRS_HROI_LOG | Click the Integration Log link on the Resume Management Details page. | View transactions in the integration log for the applicant. |
| View Candidate XML | HRS_CANDIDATE_XML | Click the Candidate XML link on the Resume Management Details page. | View the final output of the resume extraction. |



Managing Resumes

Access the Resume Management - Select Resume page (Recruiting, Administration, Manage Resumes, Resume Management - Select Resume).


Manage Resumes

Select Resume

▼ Search Criteria

First Name:
Last Name:
Email Address:
Source:
Channel:
Resolution State:
***Date Type:**
Start Date: 
End Date: 

▼ Search Results

[Customize](#) | [Find](#) | [View All](#) |  | [First](#) 1-2 of 2 [Last](#)

| | Name | Source | Channel | Resolution State | Details |
|--------------------------|---------------------------------|---------------|--------------|------------------|-------------------------|
| <input type="checkbox"/> | Maharroof Stevn | Special Promo | Apply Online | Success | Details |
| <input type="checkbox"/> | Kevin Beylev | Special Promo | Apply Online | Success | Details |

[Select All](#) [Deselect All](#)

Action:

Resume Management - Select Resume page

Search Criteria

Use this group box to enter search criteria. Click Search to display the Search Results group box.

First Name and Last Name Enter the partial or full first or last name of the applicant.

Email Address Enter the email address of the applicant.

Source Select a source. All sources that you set up by using the Source Setup component appear here.

Channel

Select a channel. Values are:

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.

Date type options include:

Notifications: Select to search based on the date a notification was sent.

Original Submission: Select to search for resumes based on the date that the resume was originally submitted.

Resolution Updates: Select to search for resumes based on the date that the resolution was updated.

Search Results

Use this group box to view the resumes that meet the search criteria. For each resume the system displays the applicant's name, the source, channel, and resolution state (resume status).

Details

Click to access the Resume Management Details page, where you can view details for the resume.

Additional Page Elements

Action and Go

Select an action and click Go. The system performs the action for all applicants that you select. For each action, the system logs a new row in the appropriate group box on the Resume Management Details page. Values are:

- *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 (on the Resume Management - Select Resume page, click the Details link for an applicant in the Search Results group box).

Resume Management Details

Name: [Maharoor Steyn](#)
Email: HCMGENUser1@ap6023fems.us.oracle.com
Vendor Source: **Channel:** Apply Online
Resume File: None

| Source History | | | |
|------------------|-----------|-----------------|-----------------|
| Marketing Source | Subsource | Last Updated | Last Updated By |
| Special Promo | Promo 1 | 02/10/09 2:48PM | SAMPLE |

| Resolution History | | | | |
|--------------------|--------------|------------------|------------------------|-------------------|
| Channel | Site ID | Resolution State | Resolution Description | Last Updated |
| AO | Default Site | Success | | 02/10/2009 2:48PM |

Action:
[Return](#)

Resume Management Details page

Name Click the applicant's name link to access the Manage Applicant page for that applicant.

Source Displays the vendor recruitment source. The system populates this field only when a resume channel is email or OIF.

Resume File Click the resume file link to open and view the resume in a separate browser window. To successfully open the file, you must have the application that the resume was created in installed on your computer.

Extraction History

Use this group box to view resume extraction history details, included the resume extractor vendor, the status of the extraction, and the time in which the extraction took place. This group box appears on this page only if the resume has been extracted.

Integration Log Click to access the Open Integration Framework - Integration Log, where you can view all transactions for the extraction.

Candidate XML Click to access the View Candidate XML page, where you can view the final output of the resume extraction.

Notification Log

Use this group box to view the notifications that the system sends to the applicant. Each time you send a notification to the applicant, the system adds a new row that describes which template was used and to whom the notification was sent. This group box does not appear on the page unless the system has sent a notification to the applicant.

Source History

Use this grid to view details about the marketing recruitment sources and subsources that are associated to this resume.

Resolution History

Use this grid to view resolution history for the resume.

Additional Page Elements

Action and Go

Select an action and click Go. Values are:

Edit Applicant: Select to access the Manage Applicant page, where you can view and modify the applicant's information.

Refresh: Select to refresh the page.

Send Notification: The system sends a notification (HRS_HROI_DRAFT, HRS_HROI_REJECT, HRS_HROI_SUCCESS, or HRS_HROI_UNRESOLVED) to the applicant. The notification that the system sends depends on the status of the resume. If the resume is from a specific source, the system looks at the setup in the Notifications group box on the Vendor page to determine which notification to send. Use the message catalog to modify the message text. When the system sends the notification, it also adds a row to the Notification Log group box that describes details about the notification.

Chapter 21

Managing Employee Referral Programs

This chapter provides an overview of the employee referral program process and discusses how to:

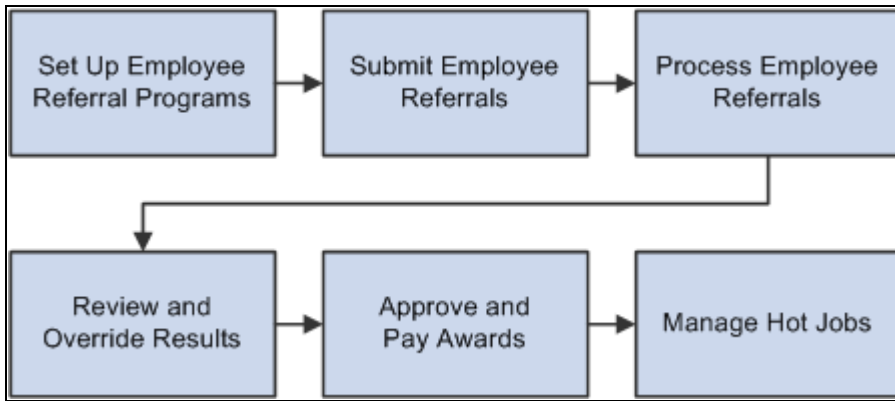
- Set up employee referral programs.
- Submit employee referrals.
- Run the employee referral process.
- Review and override the results.
- Approve and pay awards.
- Manage hot jobs.

Understanding the Employee Referral Program Process

Setting up and administering the employee referral program process includes the following tasks:

1. Set up employee referral programs.
2. Submit employee referrals.
3. Process employee referrals.
4. Review and override results.
5. Approve and pay awards.
6. Manage hot jobs.

The following diagram illustrates the task flow for setting up and administering employee referral programs.



Business process for setting up and administering employee referral programs

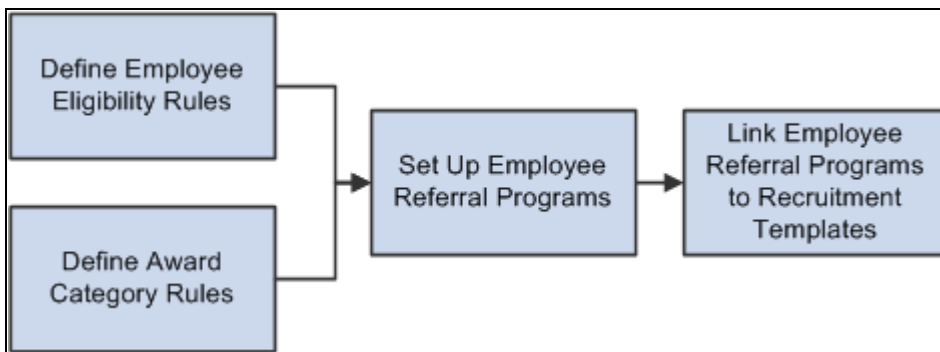
Setting Up Employee Referral Programs

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

- Define employee eligibility rules.
- Define award category rules.
- Define employee referral programs.

Understanding How to Set Up Employee Referral Programs

The following diagram shows how to set up employee referral programs by defining employee eligibility rules and award category rules, using those rules to create referral programs, and linking the programs to recruitment templates:



Process for setting up employee referral programs and linking the programs to recruitment templates

To set up employee referral programs:

1. Define employee eligibility rules using the Employee Eligibility Rules (HRS_RULE_ELIG) component.

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

To define employee eligibility rules:

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

2. Define award category rules using the Award Category Rules (HRS_RULE_AWD) component.

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

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

To define award category rules:

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

3. Define employee referral programs using the Employee Referral Program (HRS_REF_PGM) component.

To define employee referral programs:

- a. Name the employee referral programs.
- b. Set up additional criteria.
- c. Link employee eligibility and award category rules.

4. Associate an employee referral program with a recruitment template using the Recruitment Template (HRS_RCTR_TMPL) component.

By linking a referral program to a recruitment template, the system will automatically associate a referral program with a job opening when the job opening is created. In turn, the system uses this employee referral program's rules to evaluate eligibility and pay awards for the job opening.

Pages Used to Set Up Employee Referral Programs

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|---------------------------------------|------------------------|---|---|
| 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 | <ul style="list-style-type: none"> Click the View SQL link on the Employee Eligibility Rules - Rule SQL page. Click the View SQL link on the Award Category Rules - Rule SQL page. Click the View SQL link on the Hot Job Administration - Selection page. | View a SQL statement that the system generates from information that you enter on the Employee Eligibility Rules - Rule SQL page. |
| Award Category Rules | HRS_RULE_DEF | Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Award Category Rules, Award Category Rules | Name award category rules. |
| Award Category Rules - Rule SQL | HRS_RULE_SQL | Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Award Category Rules, Rule SQL | Create SQL statements for award category rules. |

| Page Name | Definition Name | Navigation | Usage |
|--------------------------------------|------------------------|---|--|
| View SQL | HRS_VW_SQL | <ul style="list-style-type: none"> 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 (Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Employee Eligibility Rules, Employee Eligibility Rules).

The screenshot shows a web interface for 'Employee Eligibility Rules'. At the top, there are two tabs: 'Employee Eligibility Rules' (selected) and 'Rule SQL'. Below the tabs, the 'Rule ID' is 'KU_EE_HD02'. The '*Description:' field contains 'US ERP - Hir Dt 02'. The '*Short Description:' field contains 'US ERP-H02'. The 'Long Description:' field contains the text: 'US ERP - Hire Date Rule 02', 'Employees based in the US who are not in the HR dept. and are either', '1. Active as of the referral date', '- OR -', and '2. employee on leave for maternaty or millitary.' There is a small icon in the top right corner of the long description field.

Employee Eligibility Rules page

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

Creating SQL Statements for Employee Eligibility Rules

Access the Employee Eligibility Rules - Rule SQL page (Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Employee Eligibility Rules, Rule SQL).

| Employee Eligibility Rules | | Rule SQL | | | | | | | | |
|--------------------------------|------------|---------------|--------------------|--------|----------|-------|---------|---------|---|---|
| Rule ID: | KU_EE_HD02 | Description: | US ERP - Hir Dt 02 | | | | | | | |
| Eligibility Selection Criteria | | | | | | | | | | |
| Open (| Record | *Field Name | *Operator | Set ID | Action | Value | Boolean | Close) | | |
| 1 (| HRS_JOB_I2 | EMPL_STATUS | Equal To | | | A | AND | | + | - |
| 2 (| HRS_JOB_I2 | EMPL_STATUS | Equal To | | | L | AND | | + | - |
| 3 (| HRS_JOB_I2 | ACTION_REASON | Equal To | | Leave of | MIL | AND | | + | - |
| 4 | HRS_JOB_I2 | ACTION_REASON | Equal To | | Leave of | MAT | AND |))) | + | - |
| 5 | HRS_JOB_I2 | REG_REGION | Equal To | | | USA | AND | | + | - |
| 6 | HRS_JOB_I2 | DEPTID | Not Equal To | SHAR | | 10000 | | | + | - |

[View SQL](#)

Employee Eligibility Rules - Rule SQL page

Open (and Close) (open and close parentheses) Use these fields to add parentheses around clauses in your selection criteria. The drop-down list box offers separate values with one to five parentheses so that you can create nested groups of clauses.

Important! Be sure to properly close all parentheses.

Record and Field

Select the record and field that hold the data to be evaluated.

Select one of these records:

- *HRS_EMPLOYMT_I* contains four employment-related fields: hire date, last date worked, rehire date, and termination date.
- *HRS_JOB_I2* contains several job-related fields, including (but not limited to) action, action reason, business unit, company, department, employee type, pay group, regulatory region, full time/part time status, regular/temporary status, and standard hours.

Operator

Enter the operator to indicate how you are going to evaluate the data in the selected field. Select from these options:

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

- Set ID** If setID is a key for the record and field that you selected, select the setID for the value that the clause evaluates.
This field does not appear if setID is not a key.

- Action** If you are evaluating data in the Action/Reason field (that is, you selected *HRS_JOB_I2* as the record and *ACTION_REASON* as the field), use this field to select an action.

- Value** Enter a value that corresponds with the record, field, and operand that you selected. You can enter either a static string or select a value from a list of valid values for the field. When selecting from a list, you are limited to values from the setID, if any, that you entered.

If you are evaluating the Action/Reason field, select a reason that is associated with the action you selected.

- Boolean** For every grid row except the last one, select *AND* or *OR* to link the clauses in the grid.

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

Naming Award Category Rules

Access the Award Category Rules page (Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Award Category Rules, Award Category Rules).

The screenshot shows a web interface for defining award category rules. At the top, there are three tabs: "Award Category Rules" (selected), "Rule SQL", and "Award Schedule". Below the tabs, the "Rule ID" is set to "KC_AWD_01A". The "*Description:" field contains "Can ERP - Award Category 01A". The "*Short Description:" field contains "Can Awd01A". The "Long Description:" field is a larger text area containing "Canadian ERP - Award category for Canadian-based sales job requisitions" and "Can\$4,000 after one year." There is a small icon in the top right corner of the long description field.

Award Category Rules page

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

Creating SQL Statements for Award Category Rules

Access the Award Category Rules - Rule SQL page (Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Award Category Rules, Rule SQL).

| Award Category Rules | | | | | | | | | |
|--------------------------|--------|--------------|--------------|------------|--------------|----------------|------------------------------|---------|-----|
| Award Category Rules | | | Rule SQL | | | Award Schedule | | | |
| Rule ID: | | KC_AWD_01A | | | Description: | | Can ERP - Award Category 01A | | |
| Award Selection Criteria | | | | | | | | | |
| | Open (| Record | *Field Name | *Operator | Set ID | Value | Boolean | Close) | |
| 1 | ▼ | HRS_JOB_I2 ▼ | REG_REGION 🔍 | Equal To ▼ | | CAN 🔍 | AND ▼ | ▼ | + - |
| 2 | ▼ | HRS_JOB_I2 ▼ | DEPTID 🔍 | Equal To ▼ | SHAR 🔍 | 22000 🔍 | ▼ | ▼ | + - |
| View SQL | | | | | | | | | |

Award Category Rules - Rule SQL page

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

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

See [Chapter 21, "Managing Employee Referral Programs," Creating SQL Statements for Employee Eligibility Rules, page 658.](#)

Defining Award Schedules

Access the Award Schedule page (Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Employee Referral Program, Employee Referral Programs).

| Award Category Rules | | Rule SQL | | Award Schedule | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|-----------|--------------------------|---------------------|------------------------------|--------------------------|---|----------------------------------|--|--|--|--|---|--|----------------|-----------|-------|--------------|-------------|----------|--|--|-----|---|------|----------|----------------------------|--------------------------|----------------------------------|----------------------------------|-----|---|--------|----------|------------------------------|--------------------------|----------------------------------|----------------------------------|-----|---|-------|----------|----------------------------|--------------------------|----------------------------------|----------------------------------|
| Rule ID: | NAWARD89 | | Description: | 8.9 CORE Award Category | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Currency Code: | US Dollar | | Award Total: | 5,000.00 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <table border="1"> <thead> <tr> <th colspan="6">Award Schedule</th> <th colspan="2">Customize Find First 1-3 of 3 Last</th> </tr> <tr> <th>*Earnings Code</th> <th>*Duration</th> <th>*Type</th> <th>*Award Value</th> <th>Description</th> <th>Gross-Up</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>001 </td> <td>7</td> <td>Days</td> <td>1,000.00</td> <td>1000 USD 7 days after hire</td> <td><input type="checkbox"/></td> <td><input type="button" value="+"/></td> <td><input type="button" value="-"/></td> </tr> <tr> <td>034 </td> <td>3</td> <td>Months</td> <td>1,500.00</td> <td>1500 USD 3 months after hire</td> <td><input type="checkbox"/></td> <td><input type="button" value="+"/></td> <td><input type="button" value="-"/></td> </tr> <tr> <td>060 </td> <td>1</td> <td>Years</td> <td>2,500.00</td> <td>2500 USD 1 year after hire</td> <td><input type="checkbox"/></td> <td><input type="button" value="+"/></td> <td><input type="button" value="-"/></td> </tr> </tbody> </table> | | | | | | Award Schedule | | | | | | Customize Find First 1-3 of 3 Last | | *Earnings Code | *Duration | *Type | *Award Value | Description | Gross-Up | | | 001 | 7 | Days | 1,000.00 | 1000 USD 7 days after hire | <input type="checkbox"/> | <input type="button" value="+"/> | <input type="button" value="-"/> | 034 | 3 | Months | 1,500.00 | 1500 USD 3 months after hire | <input type="checkbox"/> | <input type="button" value="+"/> | <input type="button" value="-"/> | 060 | 1 | Years | 2,500.00 | 2500 USD 1 year after hire | <input type="checkbox"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |
| Award Schedule | | | | | | Customize Find First 1-3 of 3 Last | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| *Earnings Code | *Duration | *Type | *Award Value | Description | Gross-Up | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 001 | 7 | Days | 1,000.00 | 1000 USD 7 days after hire | <input type="checkbox"/> | <input type="button" value="+"/> | <input type="button" value="-"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 034 | 3 | Months | 1,500.00 | 1500 USD 3 months after hire | <input type="checkbox"/> | <input type="button" value="+"/> | <input type="button" value="-"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 060 | 1 | Years | 2,500.00 | 2500 USD 1 year after hire | <input type="checkbox"/> | <input type="button" value="+"/> | <input type="button" value="-"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Award Schedule page

Currency Code

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

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

Award Total

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

Earnings Code

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

Duration and Type

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

Award Value

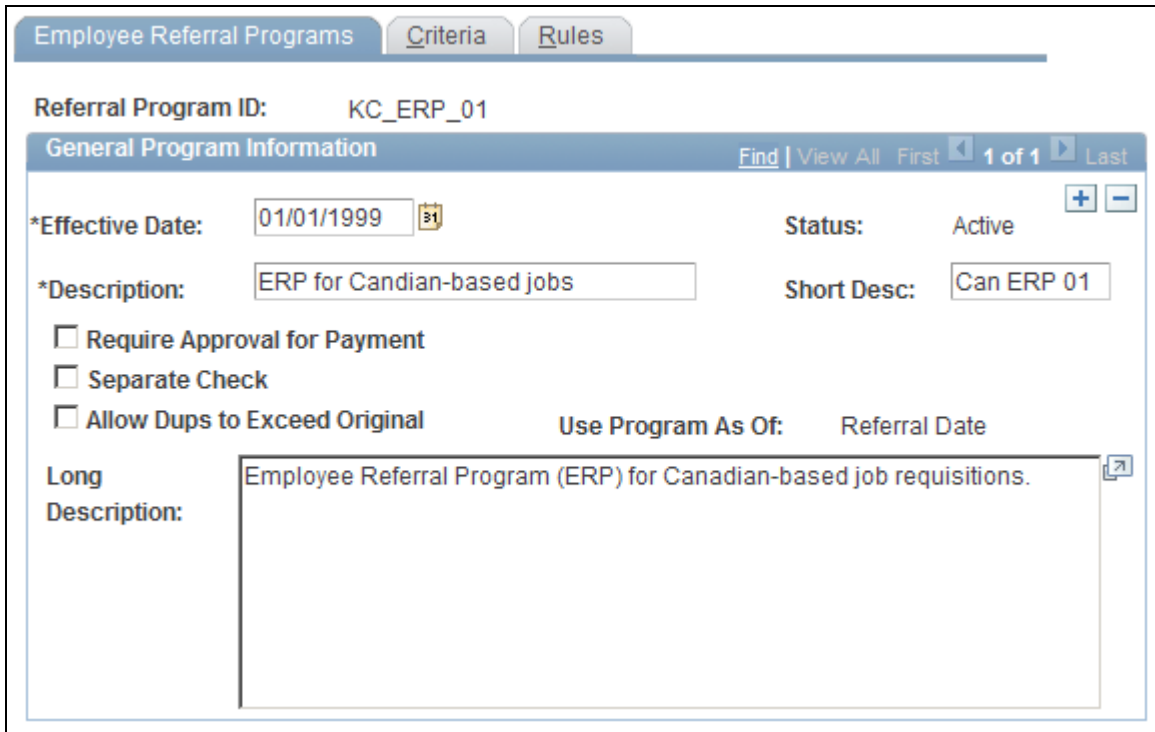
Enter the amount of a cash award or the value of a noncash award.

Gross-Up

Select this check box if the award should be grossed up.

Defining Employee Referral Programs

Access the Employee Referral Programs page (Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Employee Referral Program, Employee Referral Programs).



The screenshot shows the 'Employee Referral Programs' page with the 'Criteria' tab selected. The 'Referral Program ID' is 'KC_ERP_01'. The 'General Program Information' section includes the following fields and options:

- *Effective Date:** 01/01/1999
- Status:** Active
- *Description:** ERP for Candian-based jobs
- Short Desc:** Can ERP 01
- Require Approval for Payment
- Separate Check
- Allow Dups to Exceed Original
- Use Program As Of:** Referral Date
- Long Description:** Employee Referral Program (ERP) for Canadian-based job requisitions.

Employee Referral Programs page

- Effective Date** Enter an effective date. The system uses the effective date with the Use Program As Of field to determine the rules that are in effect for a referral.
- Require Approval for Payment** Select this check box to require approval for an award before the award is sent to the payroll system. Awards that have an Approved status can be submitted for payment. If you select this option, the system assigns a Needs Approval status to an award when the award is created. Users must manually approve the award on the Approve Employee Awards page. If you deselect this check box, awards are automatically given Approved status when they are created.
- Separate Check** Select this check box if you want the award paid separately from the employee's regular paycheck. If you are paying awards through Payroll for North America, all grossed-up awards are paid by a separate check.
- Allow Dups to Exceed Original** (allow duplicates to exceed original) Select this check box if the total award can exceed the original award amount when an award is split among several referring employees.

Use Program As Of

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

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

Defining Additional Criteria

Access the Employee Referral Program - Criteria page (Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Employee Referral Program, Criteria).

The screenshot shows the 'Criteria' tab for the 'Employee Referral Program - Criteria' page. At the top, there are three tabs: 'Employee Referral Programs', 'Criteria', and 'Rules'. The 'Criteria' tab is selected. Below the tabs, the 'Referral Program ID' is 'KC_ERP_01'. The page is divided into two main sections: 'Program Criteria' and 'Applicant Criteria'.
 In the 'Program Criteria' section, the 'Effective Date' is '01/01/1999' and the 'Description' is 'ERP for Candian-based jobs'. There are two sub-sections: 'Limit Referral Life Span To' and 'Disqualify Award if'.
 - 'Limit Referral Life Span To' includes a '*Limit Interval' dropdown set to 'Months' and an 'Interval Duration' text box with the value '2'.
 - 'Disqualify Award if' includes a checked checkbox for 'Applicant Reports to Employee' and an 'Employee Exceeds Manager Level' dropdown set to 'Vice President'.
 In the 'Applicant Criteria' section, there are two checked checkboxes: 'Allow Previous Employees' and 'Allow Family Member Referrals'. It also includes a '*Termination Interval' dropdown set to 'Months', an 'Interval Duration' text box with the value '1', and a '*Is Prior To' dropdown set to 'Applicant's Hire Date'.

Employee Referral Program - Criteria page

Limit Referral Life Span To

Limit Interval and Limit Duration Enter a time limit for how soon after the referral the applicant must be hired. The limit interval can be measured in *Months*, *Years*, or *Days*. The limit duration is the number of months, days, or years.

For example, if employees get referral credit for applicants who are hired within two months of the referral, enter *Months* as the limit interval and 2 as the limit duration.

Disqualify Award If

Use this group box to indicate conditions that disqualify the employee from the referral program.

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

Employee Exceeds Manager Level Select a value to disqualify employees above the specified level. The system evaluates employee levels as of the applicant's hire date.

To make all managers ineligible, select *All Other Positions*.

If you use this rule, you must set up the department tree structure in Human Resources.

Applicant Criteria

Allow Previous Employees Select this check box to give referral credit for applicants who are previous employees. If you select this check box, you must complete the termination interval fields in this group box.

Termination Interval, Interval Duration, and Is Prior To If you allow referral credit for previous employees, use these fields to define how long the applicant must have been away from the organization before being rehired. The system evaluates this criteria based on information that users provide when they refer friends online or information that recruiters enter for an applicant on the applicant data pages. It does not check the organization's historical records.

To allow credit for all rehires, regardless of the length of the break in service lasted, enter *0* in the Interval Duration field.

To set a minimum duration for the break in service, use the Termination Interval field to select *Months, Days, or Years*, and then enter the number of months, days, or years in the Interval Duration field. Use the Is Prior To field to indicate whether the *Applicant's Hire Date* or the *Referral Date* is used as the starting point for the look-back.

For example, if you allow referral credit for rehires only if the rehire was away for your organization at least six months before being referred, enter *Months* as the termination interval, *6* as the interval duration, and *Referral Date* as the Is Prior To setting.

Allow Family Member Referrals Select this check box to allow employees to refer members of their family.

Selecting Employee Eligibility and Award Category Rules

Access the Employee Referral Program - Rules page (Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Employee Referral Program, Rules).

| Employee Referral Programs | | | | | |
|---|-----------|--|----------------------------------|---------------------------|-----|
| Criteria | | Rules | | | |
| Referral Program ID: KC_ERP_01 | | | | | |
| Program Rules Find View All First 1 of 1 Last | | | | | |
| Effective Date: 01/01/1999 | | Description: ERP for Candian-based jobs + - | | | |
| Employee Eligibility Rules Customize Find View All First 1-2 of 2 Last | | | | | |
| *When to Apply | *Rule ID | Description | View Description | View Rule | |
| Applicant's Hire Date | KC_EE_HD | Can ERP - Hir Dt 01 | View Description | View Rule | + - |
| Award Date | KC_EE_ADC | Can ERP - Awd Dt 01 | View Description | View Rule | + - |
| Award Category Rules Customize Find View All First 1-2 of 2 Last | | | | | |
| *Priority | *Rule ID | Description | View Description | View Rule | |
| 100 | KC_AWD_01 | Can ERP - Award Category 01A | View Description | View Rule | + - |
| 200 | KC_AWD_02 | Can ERP - Award Category 02A | View Description | View Rule | + - |

Employee Referral Program - Rules page

Employee Eligibility Rules

When to Apply

Select when to apply each employee eligibility rule that you associate with this program. Valid values are *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.

Submitting Referrals

This section provides an overview of employee and applicant referrals and lists the pages used to submit, confirm, and review referrals.

Understanding Employee and Applicant Referrals

The two referral methods are:

- The employee submits application information.

Employees refer applicants through employee self-service and can review the eligibility and payment status of the referrals that they submit.

- The applicant identifies the referring employee when submitting an application.

Referral sources can be included in applications regardless of who adds the application to the system:

- External applicants can submit referral information when they apply for jobs online.
- Recruiters who manually add applications to the system can include referral source information in the application.

Employee-Initiated Referrals

Employees use the recruiting self-service pages to refer an applicant. To create a referral, an employee does the following:

1. Clicks the Refer Friend button on the Careers Home, Job Search, or My Saved Jobs self-service page.

An employee can also refer an applicant for a specific job opening by selecting a job on the Careers Home, Job Search, or My Saved Jobs page before clicking the Refer Friend button, or by clicking the Refer Friend button on the Job Description page.

2. Selects a resume option and clicks Continue on the Refer Friend - Choose Resume page.

The three resume options are:

- Copy and paste resume text.

If employees select this option, the Refer Friend - Enter Resume Text page appears. Employees enter a name for the resume in the Title field, select the language in which the resume is written in the Language field, and paste the resume text into the Resume field and click Continue.

- Upload friend's resume.

If employees select this option, they must browse for, select, and upload the applicant's resume.

- Refer friend without submitting a resume.

3. Enters the preferred contact method, name, address, email, and phone information for the applicant that they are referring on the Refer Friend - Contact Details page.

Employees must enter a first and last name for the applicant.

4. Clicks the Save & Submit button on the Refer Friend - Contact Details page.

The system creates an applicant record for the applicant, sets the applicant's status to Active, and sets the applicant's disposition to Applied if the employee submitted the referral for one or more job openings. The system automatically records the employee's ID as the applicant's referral source.

5. Confirms that the referral is successfully submitted on the My Referrals page.

Applicants also receive a confirmation email every time that a referral is submitted. The email includes a URL that enables applicants to access, review, and modify the information provided by the employee. When applicants access their online job applications, the system requires them to register online and create an account.

Applicant-Provided Referral Information

When applicants apply for job openings online, they can specify referral information if you include the Referrals section in the resume template for that job opening.

See [Chapter 7, "Setting Up Recruiting Templates," Setting Up Resume Templates, page 115.](#)

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 11, "Entering Applicant Data," Entering Application Details, page 313.](#)

See Also

PeopleSoft Enterprise Candidate Gateway 9.1 PeopleBook, "Using Candidate Gateway," Applying for Jobs

Pages Used to Submit, Confirm, and Review Referrals

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|--|------------------------|---|--|
| Refer Friend - Choose Resume | HRS_ERP_RES_OPTION | Self Service, Recruiting Activities, Careers, Careers Home Click the Refer Friend button on the Careers Home page. | Choose a resume option. The options that appear on this page vary depending on the resume template that the system selects, but can include Copy and paste resume text, Upload friend's resume, and Refer friend without resume. |
| Refer Friend - Enter Resume Text | HRS_ERP_APPLY_RES | Select the Copy and paste resume text option on the Refer Friend - Choose Resume page and click Continue. | Enter resume details. |
| Refer Friend - Contact Details | HRS_ERP_APP_PROFILE | <ul style="list-style-type: none"> Click the Continue button on the Refer Friend - Enter Resume Text page. Select the Refer friend without resume option on the Refer Friend - Choose Resume page and click Continue. Select the Upload friend's resume option on the Refer Friend - Choose Resume page, click Continue, then complete the upload process. | Enter a friend's name, address, email, and phone information. |
| My Referrals | HRS_ERP_APP_APLC | Click the Save & Submit button on the Refer a Friend - Contact Details page. | Confirm that the referral is submitted. |
| Confirm Referral - Access | HRS_REF_CONFIRM1 | Self Service, Recruiting Activities, Confirm Referral, Confirm Referral-Access Page | Enter the referral track ID and password received by email. |
| Confirm Referral | HRS_REF_CONFIRM2 | Click the Submit button on the Confirm Referral - Access page. | Confirm or cancel the referral initiated by an applicant. |
| Confirm Referral - Submit Confirmation | HRS_SUBMIT_CONF | Click the Refer this Applicant button on the Confirm Referral page. | Confirm that the referral was successfully submitted. |

| Page Name | Definition Name | Navigation | Usage |
|---------------------------------------|------------------------|--|---|
| Confirm Referral - Referral Cancelled | HRS_CNCL_CONF | Click the Cancel button on the Confirm Referral page. | Confirm that the referral was successfully cancelled. |
| Review Referral | HRS_EE_REVW_SRCH | <ul style="list-style-type: none"> • Self Service, Recruiting Activities, Check Referral Status, Review Referral • Click the View Completed Referrals link on the My Referrals page. | View the current status of referrals. You can view the eligibility and award payment status for each applicant that you refer. |
| Review Referral - Details | HRS_EE_REVW_DTL | Click a name link on the Review Referral page. | View details for a specific referral. |

Processing Employee Referrals

This section provides overviews of the Employee Referral Program (HRS_ERP_MAIN) process and payment statuses and discusses how to process eligibility and awards.

Understanding the Employee Referral Program Process

When you set up employee referral programs, you capture time-sensitive rules that dictate eligibility and awards for each referral under the particular employee referral program. The Employee Referral Program process applies these time-sensitive rules at the appropriate times in a referral's life span.

It is necessary to establish which employee referral program a referral is associated with before determining eligibility and awards. This association occurs only when an applicant is hired into a job opening that has an employee referral program associated. Therefore, you cannot determine eligibility and awards before an applicant is hired.

You can run the Employee Referral Program process for a specific employee referral program or for all employee referral programs. The Employee Referral Program process determines eligibility, creates awards, and processes award payments through PeopleSoft 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 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 21, "Managing Employee Referral Programs," Approving and Paying Referral Awards, page 688.](#)

Eligibility Processing

The Employee Referral Program process checks employee eligibility according to the rules and criteria set up in the employee referral program for the following three dates:

- Referral date.

- Hire date.
- Award date.

You associate rules with these dates by using the When to Apply field on the Employee Referral Program - Rules page in the Employee Referral Program (HRS_REF_PGM) component. Criteria apply at various times depending on the particular criteria or on how you set up the program. This table shows the dates for which the rules and criteria are processed:

| Rule or Criterion | Referral Date | Hire Date | Award Date |
|---|--|---|---|
| Employee eligibility rules | Determined by the value in the When to Apply field on the Employee Referral Program - Rules page. | Determined by the value in the When to Apply field on the Employee Referral Program - Rules page. | Determined by the value in the When to Apply field on the Employee Referral Program - Rules page. |
| Award category rules | NA | Applies | NA |
| Referral life span criteria | NA | Applies (checks the referral life span value in the Limit Referral Life Span To field on the Employee Referral Program - Criteria page against the time elapsed between the referral and hire dates). | NA |
| Employee is a direct or indirect manager of the hired applicant | NA | Applies if the Disqualify if applicant reports to the referring employee option is selected on the Employee Referral Program - Criteria page. | NA |
| Manager level criteria | NA | Applies (checks the value in the Disqualify employee if their Manager Level is greater than or equal to field on the Employee Referral Program - Criteria page). | NA |
| Previous employee criteria | May apply, depending on whether the Allow Previous Employees option is selected and on the value in the prior to the field on the Employee Referral Program - Criteria page. | May apply, depending on whether the Allow Previous Employees, option is selected and on the value in the prior to the field on the Employee Referral Program - Criteria page. | NA |

| <i>Rule or Criterion</i> | <i>Referral Date</i> | <i>Hire Date</i> | <i>Award Date</i> |
|-------------------------------------|----------------------|---|-------------------|
| Family member referral criteria | NA | Applies if the Allow Family Member Referrals option is selected on the Employee Referral Program - Criteria page. | NA |
| Applicant must be actively employed | NA | Applies | Applies |

When Eligibility is Not Recalculated

The Employee Referral Program process does not recalculate eligibility for every referral in an employee referral program every time that it runs. It does not process or reprocess eligibility under the following conditions:

- The applicant has not been hired.
- The referral has been processed and marked ineligible.
- The referral was processed and marked eligible as of the hire date, but the award date has not been reached when the process runs again.
- The eligibility status has been overridden and not marked as a reprocess.

Reprocessing Eligibility for Duplicate Applicants

Duplicate applicant records can result in erroneous employee referral program eligibility results after the applicant data is merged. Before the duplicate applicant records are merged, there can be multiple distinct applicant records and multiple distinct referral records all for the same applicant. After merging, there is only one applicant record, but the system maintains multiple referral records. You must run the Employee Referral Program process again to make sure the eligibility status is correct because the original results were based on an unmerged data set. You can override eligibility on the Administer Referrals (HRS_REF_ADMN) component and rerun the Employee Referral Program process, if necessary.

You can distribute the referral award among multiple eligible employees on the Review Duplicate Referrals page.

Awards Processing

After checking eligibility, the Employee Referral Program process begins award processing if the referral meets both of the following conditions for a particular employee referral program:

- Applicant is hired.
- Employee is eligible as of the referral date (if any rules apply) and as of the applicant's hire date.

During award processing, the system:

1. Checks the job opening that the applicant was hired into against the employee referral program's award category rules.
 - a. If the job opening *is not* in any of the award categories, the process sets the eligibility status to Ineligible and issues a message that the job opening is not covered by the employee referral program.
 - b. If the job opening *is* in an award category, the process schedules awards.

The first award category rule that the job opening satisfies determines the award schedule.

For example, if you define an award category rule for IT jobs and another for Executive Level jobs, an IT Executive level job would be associated with the rule that is first in the list of award categories.

2. Checks hot jobs.

If the job opening is a hot job, the hot job award schedule overrides the award schedule of the employee referral program award category rule.

Understanding Payment Statuses

This table describes payment status values that you might see in the Payment Status field when viewing employee referral program award data. Unless otherwise specified, *payroll* refers to PeopleSoft Enterprise Payroll for North America only:

| Payment Status | Description | Process that Writes Status |
|---------------------------------|---|---|
| Approved - Goes to Payroll (AP) | Approved award that has not yet been submitted for payment. | <ul style="list-style-type: none"> • Entered by the Employee Referral Program process if you select Eligibility and Awards Rules on the Process Referral Programs page and deselect the Require Approval for Payment option on the Employee Referral Program - Employee Referral Programs page. • Entered manually on the Referral Award Details page if you select the Require Approval for Payment option on the Employee Referral Program - Employee Referral Programs page or after correcting rejected awards. |

| Payment Status | Description | Process that Writes Status |
|--------------------------|---|--|
| Needs Approval (NA) | The employee referral program requires approval of awards and this award has not yet been approved. | <ul style="list-style-type: none"> Entered by the Employee Referral Program process if you select the Eligibility and Awards Rules option on the Process Referral Programs page and select the Require Approval for Payment on the Employee Referral Program - Employee Referral Programs page. Entered manually on the Referral Award Details page if a nonapprover corrects rejected awards. |
| Cancelled (CN) | Plan administrator cancels an award. | Entered manually on the Referral Award Details page. |
| Sent to Payroll (SP) | Awards have been published to Payroll for North America. | Entered by the Employee Referral Program process if you select Interface to Payroll for NA (interface to Payroll for North America) on the Process Referral Programs page. |
| Taken by Payroll (TP) | Payroll confirms receipt of award. | Entered by the Employee Referral Program process if you select Interface to Payroll for NA on the Process Referral Programs page. |
| Paid (PD) | Payroll has paid award. | Entered by the Employee Referral Program process if you select Interface to Payroll for NA on the Process Referral Programs page. |
| Rejected by Payroll (RP) | Payroll rejects award payment. This is typically due to erroneous data. | Entered by the Employee Referral Program process if you select Interface to Payroll for NA on the Process Referral Programs page. |
| Reversed by Payroll (RV) | Payroll reverses award payment. This is typically due to an employee being incorrectly paid. | Entered by the Employee Referral Program process if you select Interface to Payroll for NA on the Process Referral Programs page. |

Page Used to Process Eligibility and Awards

| Page Name | Definition Name | Navigation | Usage |
|---------------------------|-----------------|--|--|
| Process Referral Programs | HRS_ERP_RUN | Recruiting, Employee Referrals, Process Referral Programs, Process Referral Programs | Process eligibility and awards and submit awards to Payroll for North America. |

Processing Eligibility and Awards

Access the Process Referral Programs page (Recruiting, Employee Referrals, Process Referral Programs, Process Referral Programs).

The screenshot shows the 'Process Referral Programs' page. At the top, the title 'Process Referral Programs' is displayed in blue. Below the title, there is a 'Run Control ID: PS' field and a 'Run' button. There are two checkboxes: 'Eligibility and Awards Rules' and 'Interface to Payroll for NA'. Below these is a table titled 'Employee Referral Programs to Process' with columns 'Referral Program ID' and 'Description'. The table shows '1 of 1' records. There are navigation buttons for 'First', 'Last', and a search icon.

Process Referral Programs page

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

Eligibility and Awards Rules Select to process eligibility and create awards.

Interface to Payroll for NA (interface to Payroll for North America) Select to process award payments through Payroll for North America.

Referral Program ID Select the employee referral programs that you want to process. You can add rows as necessary. If you do not select an employee referral program, the process runs for all employee referral programs.

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.
- View eligibility by application.
- View and override duplicate referrals.
- Review eligibility overrides.
- Review award overrides.

Understanding Referral Overrides

To manage referral overrides:

- View and override eligibility and award information for referrals by using the Administer Referrals component.
- View duplicate referrals and adjust award amounts among eligible employees by using the Review Duplicate Referrals page.
- View an audit list of manual overrides, including who made the change, when the change was made, and details of the change, by using the Review Override Audit (HRS_OVERRIDE_AUDIT) component.

Pages Used to View and Override Referral Awards

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|------------------------------------|------------------------|---|---|
| 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. |

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|----------------------------|------------------------|---|--|
| Referral Award Details | HRS_EE_REF_AWD_OVR | <ul style="list-style-type: none"> Click the Details link on the Administer Referrals - Awards page. Click the Details link on the Approve Employee Awards page. <p>This page is display-only.</p> <ul style="list-style-type: none"> Click the Edit link on the Rejected Awards page. | <p>Override award details.</p> <p>Note. When you access the Referral Award Details page from the Approve Employee Awards page, the Referral Award Details page is display-only.</p> |
| Application Summary | HRS_REF_ADMN_APPDT | Recruiting, Employee Referrals, Administer Referrals, Application Summary | View eligibility by application. |
| Review Duplicate Referrals | HRS_DUP_REF | Recruiting, Employee Referrals, Track Duplicate Referrals, Review Duplicate Referrals | View and override duplicate referrals. |
| Eligibility Overrides | HRS_AUDIT_OVR_ELIG | Recruiting, Employee Referrals, Review Override Audit, Eligibility Overrides | View the audit details of manual overrides to eligibility data. You can select overrides by applicant, by employee, or by the administrator who overrode the audited field. Only referrals that contain audit information are available in the search. |
| Award Overrides | HRS_AUDIT_OVR_AWD | Recruiting, Employee Referrals, Review Override Audit, Award Overrides | View the audit details of manual overrides to award data. |

Viewing Referral Summary Information

Access the Referral Administration page (Recruiting, Employee Referrals, Administer Referrals, Referral Administration).

Referral Administration **Eligibility** Awards Application Summary

Employee Information

Empl ID: [KUTZ502](#) Joseph Randall
 Department: 10500 Benefits

Applicant Information

Applicant ID: [147](#) Eric English
 Empl ID: [KUZ112](#) Hire Date: 12/09/2000
 Job Opening ID: [200012](#) Auditor-General

Job Requisitions Referred [Customize](#) | [Find](#) | [View All](#) | [Print](#) | [Grid](#) First **1 of 1** Last

| Job Opening | Posting Title | Department | Requisition Status | Status Date |
|-------------|-----------------|------------|--------------------|-------------|
| 200012 | Auditor-General | 13000 | 110 Filled/Closed | 12/09/2000 |

Referral Administration page

Job Requisitions Referred

Use this group box to view information for all job openings to which the employee has referred the applicant.

Viewing and Overriding Employee Eligibility

Access the Administer Referrals - Eligibility page (Recruiting, Employee Referrals, Administer Referrals, Eligibility).

| Referral Administration | | Eligibility | | Awards | | Application Summary | |
|------------------------------|---|---|------------|--------|--|---------------------|--|
| Employee Information | | | | | | | |
| Empl ID: | KUTZ502 | Joseph Randall | | | | | |
| Department: | 10500 | Benefits | | | | | |
| Applicant Information | | | | | | | |
| Applicant ID: | 147 | Eric English | | | | | |
| Empl ID: | KUZ112 | Hire Date: | 12/09/2000 | | | | |
| Job Opening ID: | 200012 | Auditor-General | | | | | |
| Employee Eligibility | | | | | | | |
| Referral Program ID: | KU_ERP_01 | ERP for US-based jobs | | | | | |
| *Status: | <input type="text" value="Ineligible"/> | <input type="checkbox"/> Reprocess Eligibility/Awards | | | | | |
| Creation Date: | 06/19/2002 | Profile Seq: | 1 | | | | |
| Event Type: | General Eligibility Criteria | Event Date: | 02/15/2005 | | | | |
| Comments: | <input type="text" value="Applicant was hired before being referred."/> | | | | | | |

Administer Referrals - Eligibility page

Employee Eligibility

Use this group box to view eligibility data for each eligibility rule that is defined in the Employee Eligibility Rules group box on the Employee Referral Program - Rules page.

If the applicant has not been hired, the system issues the following message: "Eligibility has not yet been determined" in place of the fields in the Employee Eligibility group box.

Status Displays the current employee eligibility status. Values are *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.

Creation Date Displays the date that the eligibility status was originally determined by the system.

| | |
|-------------------|---|
| Event Type | <p>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:</p> <ul style="list-style-type: none">• <i>Award Eligibility Rule</i>: Eligibility rule associated with the award date in the When to Apply field on the Employee Referral Program - Rules page.• <i>General Eligibility Criteria</i>: Any of the criteria defined on the Employee Referral Program - Criteria page.• <i>Hire Eligibility Rule</i>: Eligibility rule associated with the applicant's hire date in the When to Apply field on the Employee Referral Program - Rules page.• <i>Manual Override</i>: Manual change on this page.• <i>Referral Eligibility Rule</i>: Eligibility rule associated with the referral date in the When to Apply field on the Employee Referral Program - Rules page. |
| Event Date | <p>Displays the date that the eligibility status was last changed. This field appears on the page only when the eligibility status is Ineligible.</p> |
| Comments | <p>Displays a comment that explains the reason for the eligibility status. You can manually enter a comment that supersedes the system-generated comment.</p> <p>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.</p> |

Viewing Awards

Access the Administer Referrals - Awards page (Recruiting, Employee Referrals, Administer Referrals, Awards).

| Referral Administration | | Eligibility | | Awards | | Application Summary | |
|------------------------------|-------------------------|--|---------------------|-------------|-------------------------|---------------------|--|
| Employee Information | | | | | | | |
| Empl ID: | KUTZ502 | Joseph Randall | | | | | |
| Department: | 10500 | Benefits | | | | | |
| Applicant Information | | | | | | | |
| Applicant ID: | 147 | Eric English | | | | | |
| Empl ID: | KUZ112 | Hire Date: | 12/09/2000 | | | | |
| Job Opening ID: | 200012 | Auditor-General | | | | | |
| Awards | | | | | | | |
| | | Customize Find  | | First | | 1 of 1 | |
| | | | | Last | | | |
| Award Date | Payment Status | Earnings Code | Referral Program ID | Award Value | Details | | |
| 06/09/2001 | Needs Approval | RFA | KU_ERP_01 | 1500.00 | Details | | |

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 21, "Managing Employee Referral Programs," Understanding Payment Statuses, page 675. |
| Award Value | Displays the award value. The system determines this value based on the award schedule of the award category. |
| Details | Click to access the Referral Award Details page, where you can override award details. |

Overriding Award Details

Access the Referral Award Details page (click the Details link on the Administer Referrals - Awards page or on the Approve Employee Awards page).

Referral Award Details

| | | |
|---------------------------|---|----------------------------|
| Empl ID: | Joseph Randall | KUTZ502 |
| *Award Date: | 06/09/2001 | |
| Description: | Finance Dept Ref Award | |
| *Earnings Code: | RFA | Referral Award |
| Payment Status: | Needs Approval | |
| *Payment Status Override: | Needs Approval | |
| Status Date/Time: | 06/19/2002 10:59:30AM | |
| *Dept Charged: | 13000 | Finance and Administration |
| *Award Value: | 1,500.00 | |
| Actual Amount Paid: | | |
| *Currency Code: | US Dollar | |
| | <input type="checkbox"/> Separate Check <input checked="" type="checkbox"/> Gross-Up | |
| Referral Program ID: | KU_ERP_01 | ERP for US-based jobs |
| | <input checked="" type="checkbox"/> Require Approval for Payment | |

Referral Award Details page

Much of the data on this page reflects the rules and criteria that are set up for the employee referral program. You can override the value in any editable field.

Award Date Displays the award date. The system calculates this date according to the award schedule rules.

Description Displays the description that you specified for the award on the Award Schedule page.

| | |
|---|--|
| Payment Status Override | <p>Select a payment status. Use this field to manually approve an award that has <i>Needs Approval</i> status. You can do this only if the eligibility status is <i>Eligible</i>.</p> <p>The employee referral program administrator can manually change the payment status to or from <i>Needs Approval</i>, <i>Approved</i>, or <i>Cancelled</i>.</p> <p>You cannot manually override the status of an award that is submitted to be paid, unless Payroll for North America has rejected it.</p> <p>If an award has been rejected by Payroll for North America, the employee referral program administrator can change a <i>Rejected by Payroll</i> or <i>Reversed by Payroll</i> status to one of these values:</p> <ul style="list-style-type: none"> • <i>Cancelled</i>: You accept the reason for the rejection and do not intend to correct it. • <i>Needs approval</i>: You corrected the reason for the rejection and now the award is ready to be approved again. • <i>Approved</i>: You corrected the reason for the rejection and now the award is ready to be submitted when the process runs again for the employee referral program. |
| Dept Charged (department charged) | Displays the department (of the job opening) into which the applicant was hired. |
| Award Value | Displays the amount of the award as defined in the award schedule. |
| Actual Amount Paid | Displays the value that is entered when the award is paid through Payroll for North America. |
| Currency Code | Displays the currency in which the award is paid to the employee. |
| Separate Check | Select to override the default that you set up on the Employee Referral Program - Employee Referral Programs page. |
| Gross-Up | Select to override the default that you set up on the Award Schedule page. If you select this option and use Payroll for North America, the award is paid by a separate check. |
| Require Approval for Payment | Set the value for this field on the Employee Referral Program - Employee Referral Programs page. You cannot change it here. |
| Rejected Reason | Displays the reason that Payroll for North America rejected the award. This field only appears when the award is rejected by the payroll system. |
| Last Manual Override | Displays the date of the last manual override. You can view details of the override on the Award Overrides page. This field only appears when an administrator manually changes an award payment-related field. |

Viewing Eligibility by Application

Access the Application Summary page (Recruiting, Employee Referrals, Administer Referrals, Application Summary).

| | | | | | | | |
|---|--|-----------------------------|------------|------------------------|--|-------------------------------------|--|
| Referral Administration | | Eligibility | | Awards | | Application Summary | |
| Employee Information | | | | | | | |
| Empl ID: | KUTZ502 | Joseph Randall | | | | | |
| Department: | 10500 | Benefits | | | | | |
| Applicant Information | | | | | | | |
| Applicant ID: | 147 | Eric English | | | | | |
| Empl ID: | KUZ112 | Hire Date: | 12/09/2000 | | | | |
| Job Opening ID: | 200012 | Auditor-General | | | | | |
| Eligibility by Application | | | | | | | |
| | | | | | | Find View All First 1 of 1 Last | |
| Referral Program ID: | KU_ERP_01 | ERP for US-based jobs | | | | | |
| Status: | Ineligible | Profile Seq: | 1 | | | | |
| Event Type: | General Eligibility Criteria | Event Date: | 02/15/2005 | | | | |
| Comments: | Applicant was hired before being referred. | | | | | | |

Application Summary page

This page shows all the dates on which the employee referred the applicant and the employee's eligibility status for each referral. Remember that eligibility for award payment is determined by the job opening into which the applicant is hired.

Comments Displays the reason if the eligibility status is Ineligible.

Viewing and Overriding Duplicate Referrals

Access the Review Duplicate Referrals page (Recruiting, Employee Referrals, Track Duplicate Referrals, Review Duplicate Referrals).

Employees appear on this page in the order in which they referred the applicant. The first employee that appears is the first employee who referred the applicant, and so on.

The total award for all employees can be more than the original award if you selected Allow Dups to Exceed Original (allow duplicates to exceed original) on the Employee Referral Program - Criteria page when you set up the employee referral program.

Original Award Total Displays the total value of all awards in the original award schedule.

- Current Award Total** Displays the total of all awards entered on the page for all the referring employees.
- Refresh** Click to refresh the award total amounts in the Current Award Total and Award Total fields.

Employee-Specific Page Elements

- Award Total** Displays the total value of all awards for the employee.
- Referral Time Stamp** Displays the date and time that the employee submitted the referral.
- Award Value** Adjust the award amount for each employee.
- Ineligible for referral award** Select this check box to prevent the employee from receiving referral awards. This option is not available for the first employee who submitted the referral.

Reviewing Eligibility Overrides

Access the Eligibility Overrides page (Recruiting, Employee Referrals, Review Override Audit, Eligibility Overrides).

| Eligibility Overrides | | Award Overrides | | | |
|--|----------------|--------------------------------|---------------|------------|-----------|
| Applicant ID: | 147 | English, Eric | | | |
| Employee ID: | KUTZ502 | Joseph Randall | | | |
| View Referral Information | | | | | |
| Override Audits | | | | | |
| Customize Find View All First 1 of 1 Last | | | | | |
| User ID | Name | Date and Time Stamp | Field Changed | Old Value | New Value |
| PS | Betty Locherty | 06/18/2009 9:57:12.685874AM | Status | Ineligible | Eligible |

Eligibility Overrides page

- View Referral Information** Click to access the Referral Administration page, where you can review detailed information about the referral.
- User ID, Name, and Date and Time Stamp** These fields display information about who overrode the eligibility value for this award and when the override occurred.
- Field Changed, Old Value, and New Value** These fields display information about the data that changed when the override occurred.

Reviewing Award Overrides

Access the Award Overrides page (Recruiting, Employee Referrals, Review Override Audit, Award Overrides).

The screenshot shows the 'Award Overrides' page. At the top, there are two tabs: 'Eligibility Overrides' and 'Award Overrides'. Below the tabs, the following information is displayed:

- Applicant ID:** 147 English, Eric
- Employee ID:** KUTZ502 Joseph Randall

There is a link for [View Referral Information](#). Below this is a section titled 'Employee Referral Award Overrides' with a toolbar containing 'Customize', 'Find', 'View All', and pagination controls (First, 1 of 1, Last). A table lists the overrides:

| User ID | Name | Audit Date/Time | Field Changed | Old Value | New Value |
|---------|----------------|-----------------------------|----------------|------------|-----------|
| PS | Betty Locherty | 06/18/2009 9:57:12.715101AM | Payment Status | Needs Appr | Approved |

Award Overrides page

This page is identical to the Eligibility Overrides page, but the data refers to award overrides rather than eligibility overrides.

Approving and Paying Referral Awards

This section provides overviews of award approvals and paying awards, and discusses how to.

- Approve referral awards.
- Submit awards.
- View rejected awards.
- Edit rejected awards.

Understanding Award Approvals

When you set up the employee referral program, define whether awards require approval before payment. If approval is required, the system assigns the awards the Needs Approval payment status when you run the Employee Referral Program process. You must manually approve the awards.

To manually approve awards, you can:

- Use the Approve Employee Awards page to approve all awards or selected awards in the employee referral program when the payment status is Needs Approval.

- Use the Rejected Awards page to correct and approve awards when the payment status is Rejected by Payroll.

See [Chapter 21, "Managing Employee Referral Programs," Viewing Rejected Awards, page 694.](#)

- 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 21, "Managing Employee Referral Programs," Overriding Award Details, page 683.](#)

Understanding Paying Awards

The interface between employee referral programs and payroll processing depends upon the payroll system that you use to pay the referring employee. If you pay employees through Payroll for North America, use the Employee Referral Program process to send the monetary and non-stock, non-monetary awards directly to Payroll for North America using PeopleSoft Integration Broker. If you pay employees through a payroll system other than Payroll for North America, you must create an interface to that payroll system.

Access the Process Referral Programs page and select the Interface to Payroll for NA option to run the Employee Referral Program process. The same process is used to determine eligibility and create awards.

The Employee Referral Program process:

- Submits awards for payment.

The process sends approved awards to payroll that have been scheduled with an award date prior to or equal to the current date. The process does not submit awards that have already been submitted or awards that are future-dated.

- Updates the payment status for each submitted award to Sent to Payroll.
- Retrieves paid award information from Payroll for North America.

After payroll pays an award and publishes the results, the subscription process retrieves payment information and updates these records:

- Employee referral program data records (HRS_EE_REF_AWD).
- Job opening expense data (HRS_JO_EXP).

The job opening expense amount is the amount that is paid by payroll, including taxes that have been grossed up. You can view the expense information on the Job Opening - Activity & Attachments and Add Expenses pages. The expense code value is *Referral Fee*.

The payroll system:

- Calculates gross-up amounts and taxes.
- Pays the cash awards.
- Posts the amounts to the appropriate general ledger account.

If the currency code of the award does not match the currency code of the employee's pay group, the award is rejected and the employee referral program administrator must use the Rejected Awards page to override the values.

If the converted amount of the award is greater than 8.2 digits, the award is rejected and the employee referral program administrator must use the Rejected Awards page to split the award into two payments.

Integration with Payroll for North America Process Flow

This table outlines the award payout integration between employee referral programs and Payroll for North America:

| Integration Step | Description |
|---|--|
| Employee referral program publishes a payment request for approved awards to payroll. | Publishes the award amount in the currency of the award category. Sets the award's payment status to Sent to Payroll. |
| Payroll subscribes to the payment request, which automatically runs a PeopleSoft Application Engine process to validate or reject the award data and publishes an acknowledgement of acceptance or rejection. | Subscription inserts the awards into a subscribing staging table. Validation checks for error conditions that require correction prior to loading to paysheet. If award data is valid, the system inserts the awards into the application table and publishes an acknowledgement that sets the award's payment status to Taken by Payroll. If errors are detected, the system publishes an acknowledgment that sets the award's payment status to Rejected by Payroll and supplies a reason code. |
| Employee referral program subscribes to the acknowledgement of rejected awards or awards with errors. | Employee referral program administrator uses the Rejected Awards page to view the reason for rejection and the Referral Award Details page to correct the award data. |
| Payroll processes validated awards and issues checks. | Payroll creates paysheets, calculates gross-up amounts and taxes, confirms pay, issues checks, and posts amounts to the general ledger. |
| Payroll runs a PeopleSoft Application Engine process to 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:

| <i>Integration Point</i> | <i>Service Operation</i> | <i>Definition</i> |
|---|------------------------------|---|
| 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

Pages Used to Approve and Pay Referral Awards

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|---------------------------|------------------------|---|--|
| Approve Employee Awards | HRS_MASS_APRV | Recruiting, Employee Referrals, Approve Employee Awards, Approve Employee Awards | Approve referral awards that have the status of Needs Approval. |
| Referral Award Details | HRS_EE_REF_AWD_OVR | <ul style="list-style-type: none"> Click the Details link on the Administer Referrals - Awards page. Click the Details link on the Approve Employee Awards page. <p>This page is display-only.</p> <ul style="list-style-type: none"> Click the Edit link on the Rejected Awards page. | <p>Override award details.</p> <p>Note. When you access the Referral Award Details page from the Approve Employee Awards page, the Referral Award Details page is display-only.</p> |
| Process Referral Programs | HRS_ERP_RUN | Recruiting, Employee Referrals, Process Referral Programs, Employee Referral Programs | Submit awards to Payroll for North America and process eligibility and awards. |

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|------------------------|------------------------|---|--|
| Rejected Awards | HRS_REJECTED_AWDS | Recruiting, Employee Referrals, Review Rejected Awards, Rejected Awards | View rejected awards. |
| Referral Award Details | HRS_EE_REF_AWD_OVR | <ul style="list-style-type: none"> Click the Details link on the Administer Referrals - Awards page. Click the Details link on the Approve Employee Awards page. <p>This page is display-only.</p> <ul style="list-style-type: none"> Click the Edit link on the Rejected Awards page. | <p>Override award details.</p> <p>Note. When you access the Referral Award Details page from the Approve Employee Awards page, the Referral Award Details page is display-only.</p> |

Approving Referral Awards

Access the Approve Employee Awards page (Recruiting, Employee Referrals, Approve Employee Awards, Approve Employee Awards).

Approve Employee Awards

Description: ERP for US-based jobs Referral Program ID: KU_ERP_01

| Awards to Approve | | | | | | |
|--------------------------|------------|---------|-------------------|-------------|---------------------------|-------------------------|
| Select | Award Date | Empl ID | Name | Award Value | Description | Details |
| <input type="checkbox"/> | 06/14/2001 | KUTZ500 | Joan Foster | 1,500.00 | Finance Dept Ref Award | Details |
| <input type="checkbox"/> | 06/11/2001 | KUTZ501 | Alec Billings | 1,500.00 | Finance Dept Ref Award | Details |
| <input type="checkbox"/> | 06/11/2001 | KUTZ501 | Alec Billings | 500.00 | Cash | Details |
| <input type="checkbox"/> | 06/10/2001 | KUTZ501 | Alec Billings | 4,000.00 | HR Director Hot Job Award | Details |
| <input type="checkbox"/> | 05/12/2002 | KUTZ501 | Alec Billings | 2,000.00 | HR Director Hot Job Award | Details |
| <input type="checkbox"/> | 06/13/2001 | KUTZ504 | Maryellen McBride | 750.00 | Fine Cheese Basket | Details |
| <input type="checkbox"/> | 06/10/2001 | KUTZ505 | Ione Crane | 129.00 | Fancy Fruit Basket | Details |

[Select All](#) [Deselect All](#)

Approve Employee Awards page

All awards that have the Needs Approval payment status appear on this page.

- Select** Select the referral awards that you want to approve.
- Details** Click to access the Referral Award Details page, where you can view referral award details.
- Select All** Click to select all referral awards in the list, including those outside the view area.
- Approve** Click to approve the selected referral awards. After awards are approved, they do not appear on this page again.

Submitting Awards

Access the Process Referral Programs page (Recruiting, Employee Referrals, Process Referral Programs, Employee Referral Programs).

See [Chapter 21, "Managing Employee Referral Programs," Processing Eligibility and Awards, page 677.](#)

Viewing Rejected Awards

Access the Rejected Awards page (Recruiting, Employee Referrals, Review Rejected Awards, Rejected Awards).

| | |
|------------------------|---|
| Rejected Reason | Displays the reason that Payroll for North America rejected the award. Use this to determine which data to correct. Values are: <ul style="list-style-type: none">• <i>Amount Exceeds Payroll Maximum</i>• <i>Expenses Sheet in Error</i>• <i>Invalid Currency Code</i>• <i>Invalid Earning Code</i>• <i>Invalid Employee ID & Record #</i> (invalid employee ID and record number)• <i>Problem in loading to file</i>• <i>Reject All - Requested by User</i>• <i>Transaction Already Exists</i> |
| Edit | Click to access the Referral Award Details page, where you can correct the error that caused rejection. |

Editing Rejected Awards

Access the Referral Award Details page (click the Details link on the Administer Referrals - Awards page or on the Approve Employee Awards page).

Note. You can also override or reprocess eligibility for a rejected award on the Administer Referrals - Eligibility page.

See Also

[Chapter 21, "Managing Employee Referral Programs," Overriding Award Details, page 683](#)

[Chapter 21, "Managing Employee Referral Programs," Viewing and Overriding Employee Eligibility, page 680](#)

Managing Hot Jobs

This section provides an overview of hot jobs and discusses how to:

- Name and describe hot job categories.

- Create SQL statements to define job opening selection criteria.
- Remove selected job openings from the hot job category.
- Set up award schedules.

Understanding Hot Jobs

Hot jobs are jobs with special award schedules that override regular employee referral program awards. You set up hot job categories, add job openings to the categories, and create an award schedule for each category.

Hot job categories are like regular award categories, but you associate hot job categories directly with job openings rather than with employee referral programs.

Hot Job Identification

To add job openings to a hot job category, you create one or more SQL queries to select job openings that meet your criteria. When you run a query, the system adds the job openings that meet the criteria to a list that you can review and modify.

Hot jobs are not effective-dated. After job openings are marked as hot jobs, they remain hot jobs until you remove them from the list. Similarly, newly created job openings that meet the criteria to be a hot job are not automatically marked as hot jobs. You must run the selection process before adding or removing any job openings from the hot job list.

The Job Opening page identifies hot jobs by displaying a flame icon next to the job opening ID.

Certain reports also include information to identify hot jobs, including HRS003 (Job Opening Status Listing), HRS005 (Candidate Listing), and HRS006 (Job Opening Cost Analysis).

Hot Job Eligibility and Award Schedules

The hot job award schedule overrides the award schedule that is associated with the job opening through an employee referral program. However, hot job awards are paid only if the referral satisfies the employee eligibility criteria of the employee referral program—that is, they do not override the referral program's employee eligibility criteria.

For example, suppose that an employee referral program pays awards six months after an applicant is hired, while the hot job award is paid three months after the hire date. In this situation, eligibility is checked at the three-month point but not at the six-month point. The employee referral program *eligibility rules* apply, but the hot job *awards schedule* overrides the employee referral program award schedule once the eligibility criteria are met.

Note. There is no safeguard in the system against creating hot job awards of less value than in the employee referral program award category. Therefore, you must use caution when setting up hot job awards.

Hot Jobs Administration

You administer hot jobs using the Hot Job Administration (HRS_RULE_HOTJOB) component. Hot job administration includes these steps:

1. Name and describe a hot job category on the Hot Jobs page.

2. Create SQL statements that define job opening selection criteria on the Hot Job Administration - Selection page.
3. Click the Select Hot Jobs button on the Hot Job Administration - Selection page to create a list of job openings that meet your SQL selection criteria.
4. Review the list of job openings, and remove any that you don't want to include, on the Job Openings page.
5. Set up the amounts and timing of awards for the hot job category on the Award Schedule page.
6. View the history of a requisition's hot job status on the Hot Job History page.

Note. The Hot Jobs component also includes the same Awards Schedule page that appears in the Employee Referral Program component.

Pages Used to Manage Hot Jobs

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|-------------------------------------|------------------------|---|--|
| 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 | <ul style="list-style-type: none"> • Click the View SQL link on the Employee Eligibility Rules - Rule SQL page. • Click the View SQL link on the Award Category Rules - Rule SQL page. • Click the View SQL link on the Hot Job Administration - Selection page. | View a SQL statement that the system generates from information that you enter on the Hot Job Administration - Selection page. |
| Job Openings | HRS_RULE_HJ | Recruiting, Employee Referrals, Hot Jobs, Job Openings | Remove selected job openings from the hot job category and associate employee referral programs with job openings. |
| Award Schedule | HRS_RULE_AWD_SCH | Recruiting, Employee Referrals, Hot Jobs, Award Schedule | Set up award schedules. |

| Page Name | Definition Name | Navigation | Usage |
|-----------------|-----------------|--|---|
| Hot Job History | ER_HOTJOB_HIST | Recruiting, Employee Referrals, Hot Job History, Hot Job History | View the history of a job opening's hot job status. |

Naming and Describing Hot Job Categories

Access the Hot Jobs page (Recruiting, Employee Referrals, Hot Jobs, Hot Jobs).

The screenshot shows the 'Hot Jobs' page with tabs for 'Hot Jobs', 'Selection', 'Job Openings', and 'Award Schedule'. The 'Hot Jobs' tab is active. The page displays the following information:

- Rule ID:** KU0002
- *Description:** Hot Job for HR Director
- *Short Description:** HRDirector
- Long Description:** Hot Job for HR Director - \$4,000

Hot Jobs page

Creating SQL Statements to Define Job Opening Selection Criteria

Access the Hot Job Administration - Selection page (Recruiting, Employee Referrals, Hot Jobs, Selection).

The screenshot shows the 'Hot Job Administration - Selection' page with tabs for 'Hot Jobs', 'Selection', 'Job Openings', and 'Award Schedule'. The 'Selection' tab is active. The page displays the following information:

- Rule ID:** KU0002
- Description:** Hot Job for HR Director

Hot Job Selection Criteria

| | Open (| Record | *Field Name | *Operator | Value | Boolean | Close) | | |
|---|--------|----------|-----------------|-----------|--------|---------|---------|---|---|
| 1 | ▼ | HRS_JO_I | HRS_JOB_OPENING | Equal To | 200003 | ▼ | ▼ | + | - |

At the bottom of the page, there are two buttons: [View SQL](#) and [Select Hot Jobs](#).

Hot Job Administration - Selection page

The Selection page is identical to the Employee Eligibility Rules - Rule SQL page that you use to set up employee eligibility rules with the addition of a Select Hot Jobs button.

See [Chapter 21, "Managing Employee Referral Programs," Creating SQL Statements for Employee Eligibility Rules, page 658.](#)

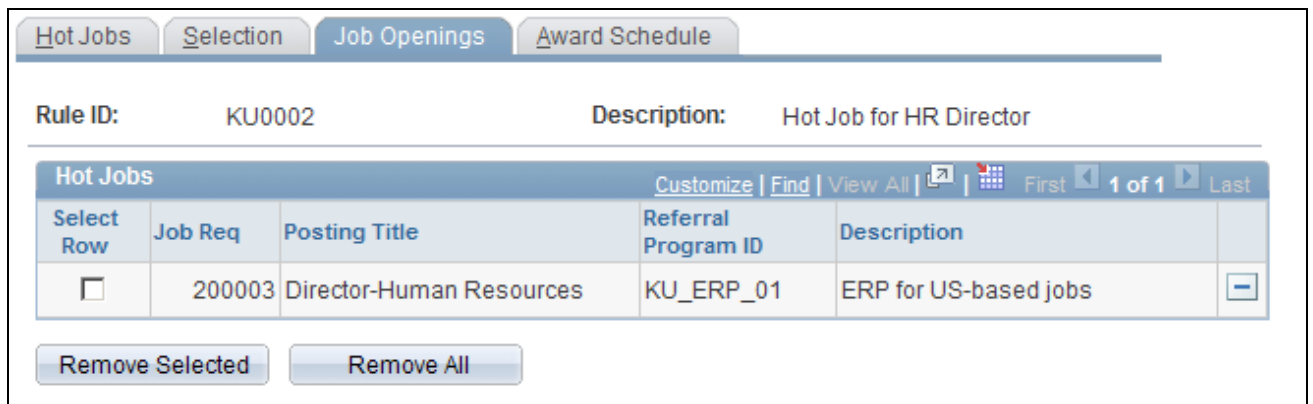
Create SQL statements to define job opening selection criteria and then click the Select Hot Jobs button to load qualifying job openings into the Job Openings page.

The system does not list job openings that have already been selected into another hot job category.

If you previously created a list of job openings for this hot job category, the system reapplies the criteria, and any job opening that no longer qualifies does not appear on the list. For example, if *Open* status is a criteria, a job opening that now has *Reopen* status does not appear on the list.

Removing Selected Job Openings from the Hot Job Category

Access the Job Openings page (Recruiting, Employee Referrals, Hot Jobs, Job Openings).



Job Openings page

Hot Jobs

Referral Program ID If you have associated the job opening with an employee referral program, the employee referral program ID appears here. If the job opening is not associated with an employee referral program, select one here. You must associate a job opening with an employee referral program; otherwise, the system cannot determine employee eligibility for awards.

Action Buttons

Remove Selected Click to remove job openings for which you have selected the Select 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.

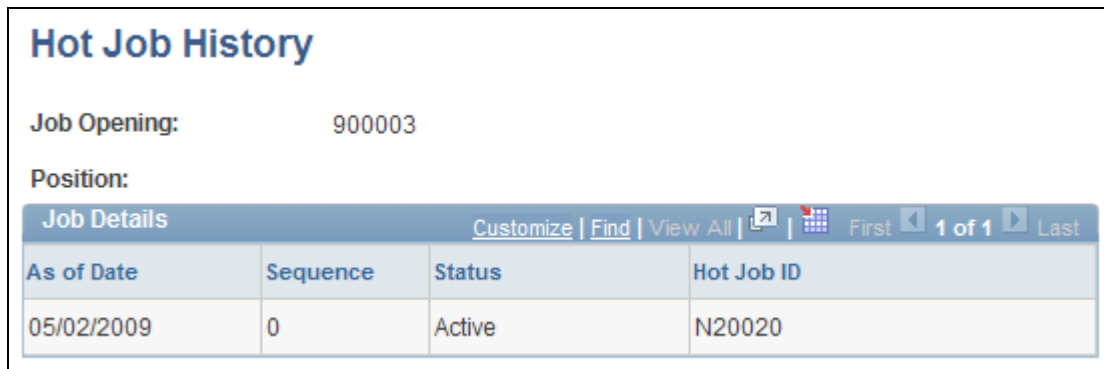
Setting Up Award Schedules

Access the Award Schedule page (Recruiting, Employee Referrals, Hot Jobs, Award Schedule).

See [Chapter 21, "Managing Employee Referral Programs," Defining Award Schedules, page 661.](#)

View Hot Job History

Access the Hot Job History page (Recruiting, Employee Referrals, Hot Job History, Hot Job History).



The screenshot shows the 'Hot Job History' page. At the top, it displays 'Job Opening: 900003' and 'Position:'. Below this is a table with a header row and one data row. The header row includes columns for 'As of Date', 'Sequence', 'Status', and 'Hot Job ID'. The data row shows the date '05/02/2009', sequence '0', status 'Active', and job ID 'N20020'. Above the table, there are navigation options: 'Job Details', 'Customize', 'Find', 'View All', 'First', '1 of 1', and 'Last'.

| As of Date | Sequence | Status | Hot Job ID |
|------------|----------|--------|------------|
| 05/02/2009 | 0 | Active | N20020 |

Hot Job History

Appendix A

Delivered Workflows for Talent Acquisition Manager

This appendix discusses:

- Delivered workflows for Talent Acquisition Manager.
- Delivered notification templates.

See Also

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 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Approvals"

Chapter 10, "Creating Job Openings," page 205

Chapter 15, "Making Job Offers," page 469

Job Offer Approval

This section discusses the Job Offer Approval workflow.

Description

| | |
|--------------------------|--|
| Event Description | A hiring manager or recruiter submits a job offer. |
|--------------------------|--|

| | |
|----------------------------|--|
| Action Description | The system routes the job offer to approvers for approval or denial. |
| Notification Method | Email and worklist. |

Workflow Objects

| | |
|--------------------------|------------------|
| Event | Launch, Approve |
| Participant | Approvers |
| Email Template | JobOfferApproval |
| Business Process | EOAW_APPROVALS |
| Business Activity | EOAW_ROUTE |

Job Offer Approved

This section discusses the Job Offer Approved workflow.

Description

| | |
|----------------------------|--|
| Event Description | Final approver approves a job offer. |
| Action Description | The system marks the job offer as approved and notifies the requester. |
| Notification Method | Email and worklist. |

Workflow Objects

| | |
|--------------------------|------------------|
| Event | OnApprove |
| Participant | Requester |
| Email Template | JobOfferApproved |
| Business Process | EOAW_APPROVALS |
| Business Activity | EOAW_ROUTE |

Job Offer Deny

This section discusses the Job Offer Deny workflow.

Description

| | |
|----------------------------|---|
| Event Description | An approver denies the job offer. |
| Action Description | The system marks the job offer as denied, ending the workflow process. The system notifies the requester. |
| Notification Method | Email and worklist. |

Workflow Objects

| | |
|--------------------------|----------------|
| Event | OnDeny |
| Participant | Requester |
| Email Template | JobOfferDeny |
| Business Process | EOAW_APPROVALS |
| Business Activity | EOAW_ROUTE |

Job Offer Error

This section discusses the Job Offer Error workflow.

Description

| | |
|----------------------------|--|
| Event Description | An approval workflow error occurred in the approval routing. This can occur as a result of the approval process configuration or because of approval rules or criteria violations. |
| Action Description | The system routes the job offer to the administrator for resolution. |
| Notification Method | Email and worklist. |

Workflow Objects

| | |
|-------------------------|----------------|
| Event | Error |
| Participant | Administrator |
| Email Template | JobOfferError |
| Business Process | EOAW_APPROVALS |

| | |
|--------------------------|------------|
| Business Activity | EOAW_ROUTE |
|--------------------------|------------|

Job Offer Escalation

This section discusses the Job Offer Escalation workflow.

Description

| | |
|----------------------------|---|
| Event Description | An approver has not responded to a job offer within the allotted time. |
| Action Description | The system notifies the approver and the approver's supervisor and routes the job offer to the next step. |
| Notification Method | Email and worklist. |

Workflow Objects

| | |
|--------------------------|--------------------|
| Event | Escalate |
| Participant | Dynamic |
| Email Template | JobOfferEscalation |
| Business Process | EOAW_APPROVALS |
| Business Activity | EOAW_ROUTE |

Job Offer Review

This section discusses the Job Offer Review workflow.

Description

| | |
|----------------------------|--|
| Event Description | An approver routes the job offer to reviewers to review. |
| Action Description | The system notifies reviewers that they must review the job offer. |
| Notification Method | Email and worklist. |

Workflow Objects

| | |
|--------------|--------|
| Event | Review |
|--------------|--------|

| | |
|--------------------------|----------------|
| Participant | Reviewers |
| Email Template | JobOfferReview |
| Business Process | EOAW_APPROVALS |
| Business Activity | EOAW_ROUTE |

Job Offer Termination

This section discusses the Job Offer Termination workflow.

Description

| | |
|----------------------------|--|
| Event Description | A user that has access to the job offer makes a change to a field that might require the job offer to be evaluated again or an administrator overrides the approval process. |
| Action Description | The system terminates the job offer approval process and notifies the requester. |
| Notification Method | Email and worklist. |

Workflow Objects

| | |
|--------------------------|---------------------|
| Event | Termination |
| Participant | Requester |
| Email Template | JobOfferTermination |
| Business Process | EOAW_APPROVALS |
| Business Activity | EOAW_ROUTE |

See Also

[Chapter 15, "Making Job Offers," Understanding Job Offer Approvals, page 486](#)

Job Opening Approval

This section discusses the Job Opening Approval workflow.

Description

| | |
|----------------------------|--|
| Event Description | A hiring manager or recruiter submits a job opening. |
| Action Description | The system routes the job opening to approvers for approval or denial. |
| Notification Method | Email and worklist. |

Workflow Objects

| | |
|--------------------------|--------------------|
| Event | Approve, Launch |
| Participant | Approvers |
| Email Template | JobOpeningApproval |
| Business Process | EOAW_APPROVALS |
| Business Activity | EOAW_ROUTE |

Job Opening Approved

This section discusses the Job Opening Approved workflow.

Description

| | |
|----------------------------|--|
| Event Description | Final approver approves a job opening. |
| Action Description | The system marks the job opening as approved and notifies the requester. |
| Notification Method | Email and worklist. |

Workflow Objects

| | |
|--------------------------|--------------------|
| Event | OnApprove |
| Participant | Requester |
| Email Template | JobOpeningApproved |
| Business Process | EOAW_APPROVALS |
| Business Activity | EOAW_ROUTE |

Job Opening Deny

This section discusses the Job Opening Deny workflow.

Description

| | |
|----------------------------|---|
| Event Description | An approver denies the job opening. |
| Action Description | The system marks the job opening as denied, ending the workflow process. The system notifies the requester. |
| Notification Method | Email and worklist. |

Workflow Objects

| | |
|--------------------------|----------------|
| Event | OnDeny |
| Participant | Requester |
| Email Template | JobOpeningDeny |
| Business Process | EOAW_APPROVALS |
| Business Activity | EOAW_ROUTE |

Job Opening Error

This section discusses the Job Opening Error workflow.

Description

| | |
|----------------------------|--|
| Event Description | An approval workflow error occurred in the approval routing. This can occur as a result of the approval process configuration or because of approval rules or criteria violations. |
| Action Description | The system routes the job opening to the administrator for resolution. |
| Notification Method | Email and worklist. |

Workflow Objects

| | |
|--------------------|---------------|
| Event | Error |
| Participant | Administrator |

| | |
|--------------------------|-----------------|
| Email Template | JobOpeningError |
| Business Process | EOAW_APPROVALS |
| Business Activity | EOAW_ROUTE |

Job Opening Escalation

This section discusses the Job Opening Escalation workflow.

Description

| | |
|----------------------------|---|
| Event Description | An approver has not responded to a job opening within the allotted time. |
| Action Description | The system notifies the approver and the approver's supervisor and routes the job opening to the next step. |
| Notification Method | Email and worklist. |

Workflow Objects

| | |
|--------------------------|----------------------|
| Event | Escalate |
| Participant | Dynamic |
| Email Template | JobOpeningEscalation |
| Business Process | EOAW_APPROVALS |
| Business Activity | EOAW_ROUTE |

Job Opening Review

This section discusses the Job Opening Review workflow.

Description

| | |
|----------------------------|--|
| Event Description | An approver routes the job opening to reviewers to review. |
| Action Description | The system notifies reviewers that they must review the job opening. |
| Notification Method | Email and worklist. |

Workflow Objects

| | |
|--------------------------|------------------|
| Event | Review |
| Participant | Reviewers |
| Email Template | JobOpeningReview |
| Business Process | EOAW_APPROVALS |
| Business Activity | EOAW_ROUTE |

Job Opening Termination

This section discusses the Job Opening Termination workflow.

Description

| | |
|----------------------------|--|
| Event Description | A user that has access to the job opening makes a change to a field that might require the job opening to be evaluated again or an administrator overrides the approval process. |
| Action Description | The system terminates the job opening approval process and notifies the requester. |
| Notification Method | Email and worklist. |

Workflow Objects

| | |
|--------------------------|-----------------------|
| Event | Termination |
| Participant | Requester |
| Email Template | JobOpeningTermination |
| Business Process | EOAW_APPROVALS |
| Business Activity | EOAW_ROUTE |

See Also

[Chapter 10, "Creating Job Openings," Understanding Job Opening Approvals, page 291](#)

Delivered Notification Templates

This table lists the delivered notification templates for Talent Acquisition Manager.

| Template Name | Description |
|----------------------------|---------------------------------|
| ApplicantStsEffct | Applicant Status Change |
| AutomatchNotification | Recruiter Job Opening Notify |
| HRS_APPLICANT_PASSWORD | Applicant Password/User ids |
| HRS_APP_RTE | Applicants Route Notification |
| HRS_APP_RTE_NOJOB | Application Route - No Job |
| HRS_APP_RTE_NORCMNT | Application Route - No Rcmt ID |
| HRS_ARM_GENERICRESEND | Send Correspondence Resend |
| HRS_CE_APPL_APPLY_JOB | Submit resume notification |
| HRS_CE_EML_FRND | Email a Friend |
| HRS_EMPL_CNFRM_REF | Employee Confirm Referral |
| HRS_EVAL_ASGN | Evaluator Assigned to Job Open |
| HRS_EVAL_REMOVE | Remove Evaluator Notification |
| HRS_FORWARD_APPLICANT | Forward Applicant |
| HRS_HROI_DRAFT | Notify on Draft Status |
| HRS_HROI_REJECT | Notify on Reject |
| HRS_HROI_SUCCESS | Notify on Success |
| HRS_HROI_UNRESOLVED | Notification sent on Unresolved |
| HRS_ICALENDAR_NOTIFY | ICalendar Notification |
| HRS_INTVWSCHED_APPL | Notify Interview Applicant |
| HRS_INTVWSCHED_APPL_NOJO | NotifyInterviewApplicant |
| HRS_INTVWSCHED_NOJO_CANCEL | NotifyCancelledIntTeamnojo |

| Template Name | Description |
|----------------------------|----------------------------------|
| HRS_INTVWSCHED_TEAM_CANCEL | NotifyCancelledInterviewTeam |
| HRS_INTVW_APP_CANCEL | Notify Interview Cancellation |
| HRS_INTVW_CANCEL_APP_NOJO | Notify Interview Cancellation |
| HRS_INTVW_EVAL_RMNDR | Interview Evaluation Reminder |
| HRS_INTVW_SCHED_TEAM | Notify Interview Team |
| HRS_INTVW_SCHED_TEAM_NOJO | Notify Interview Team |
| HRS_INT_CUSTOMIZE_MSG | Customize Message Request |
| HRS_INT_EVAL_DELETE_RETURN | Interview Evaluation Return |
| HRS_INT_EVAL_SUBMIT | Interview Evaluation Submit |
| HRS_INT_GEN_MTG_RQST | GeneralMeetingRequest |
| HRS_INVITE_APPLICATION | Invite Employee to Apply |
| HRS_LINK_APPJO HRS | Link Applicant to JO |
| HRS_NOTIFY_RECRUITERS | Send email to recruiters |
| HRS_OFFER_DOC_ATCH | Offer Doc Attachment Notice |
| HRS_OFFER_NOTICE | Online Job Offer Notice |
| HRS_OFFER_RESPONSE | Online Job Offer Response |
| HRS_QSTN_REQUEST | Questionnaire Request |
| HRS_SEND_CRSP_GEN_EML | Generic Correspondence |
| HRS_SEND_EVAL | Send Email to Evaluators |
| HRS_UNEVAL_ANS | Unevaluated Answers |
| HRS_UPDATE_REFERENCES | Applicant References |
| HR_ERR_NOTIF | Hire Error Notification Template |
| HR_HIRE_NOTIF | Hire Notification template |
| JobAgentNotification | Applicant Job Agent Notify |
| JobOfferApproval | Job Offer Approval Routing |

| Template Name | Description |
|-----------------------|-------------------------------|
| JobOfferApproved | Job Offer Has Been Approved |
| JobOfferDeny | Job Offer Has Been Denied |
| JobOfferError | Job Offer Error |
| JobOfferEscalation | Job Offer Escalation |
| JobOfferReview | Job Offer Review |
| JobOfferTermination | Job Offer Termination |
| JobOpeningApproval | Job Opening Approval Routing |
| JobOpeningApproved | Job Opening Has Been Approved |
| JobOpeningDeny | Job Opening Has Been Denied |
| JobOpeningError | Job Opening Error |
| JobOpeningEscalation | Job Opening Escalation |
| JobOpeningReview | Job Opening Review |
| JobOpeningStsEffct | Job Opening Status Change |
| JobOpeningTermination | Job Opening Termination |
| OtherStsEffct | Status Change |

Appendix B

Delivered Permission Lists and Roles for Talent Acquisition Manager

This section provides an overview of how security is used in PeopleSoft Enterprise Talent Acquisition Manager and list the delivered permission lists and roles.

Delivered Permission Lists and Roles

The following table lists Talent Acquisition Manager delivered permission lists and roles:

| <i>Permission List</i> | <i>Roles</i> | <i>Description</i> |
|-------------------------------|--|-----------------------------|
| HCCPRS0000 | Recruitment User | Recruiting Solutions Hidden |
| HCCPRS1000 | Recruitment Administrator | Set Up Recruiting Solutions |
| HCCPRS1010 | RS Technical Administrator Recruitment Administrator | Set Up RS Integrations |
| HCCPRS1020 | RS Approval Administrator Recruitment Administrator | Set Up Approvals |
| HCCPRS1030 | Hiring Manager Recruiter Recruitment Administrator | Candidate Management |
| HCCPRS1040 | Hiring Manager Recruiter Recruitment Administrator | Job Opening Management |
| HCCPRS1050 | Applicant | RS Applicant Self-Service |
| HCCPRS1060 | Hiring Manager Recruiter Recruitment Administrator | RS Applicant List |
| HCCPRS1070 | Federal Recruiter | (USF) Recruiting Solutions |

| Permission List | Roles | Description |
|------------------------|--|-------------------------------------|
| HCCPRS1090 | Hiring Manager Recruiter Recruitment Administrator | RS Reports |
| HCCPRS1100 | External Applicant | External Applicant |
| HCCPRS1110 | Recruitment Administrator | Recruitment Referrals |
| HCCPRS1120 | Employee | Employee Recruitment |
| HCCPRS1130 | Hiring Manager Recruiter Recruitment Administrator | Recruiting Solutions Pagelets |
| HCCPRS1140 | Recruitment Administrator | Recruiting Teams |
| HCCPRS1150 | Recruiter Recruitment Administrator | Resume Management |
| HCCPRS1160 | RS Technical Administrator Recruitment Administrator | RS Technical Utilities |
| HCCPRS1170 | Hiring Manager Recruiter Recruitment Administrator | Interviews |
| HCCPRS1175 | Evaluator for Open Ended Quest | Evaluators for Open Ended Questions |
| HCCPRS1180 | Recruiter Recruitment Administrator | Manage Interviews |
| HCCPRS1190 | Recruitment Administrator | RS Salary Package Model |
| HCCPRS1200 | Recruiter Recruitment Administrator | RS Saved Searches |
| HCCPRS1210 | Recruitment Administrator | Checklists |
| HCCPRS1220 | Hiring Manager Recruiter Recruitment Administrator | RS Prepare for Hire |

| Permission List | Roles | Description |
|------------------------|--|-------------------------------|
| HCCPRS1230 | Hiring Manager Recruiter Recruitment Administrator | RS Contracts |
| HCCPRS1240 | Hiring Manager Recruiter Recruitment Administrator | RS Send Correspondence |
| HCCPRS1250 | Recruiter Recruitment Administrator | RS Candidate Data Full Access |
| HCCPRS1260 | Hiring Manager | RS Candidate Data Restricted |
| HCCPRS1270 | Recruitment Administrator | JO from Position Creation |
| HCCPRS1280 | Recruitment Administrator | Manage Duplicate Applicants |
| HCSPRS9020 | Recruitment User | RS Standard Message Channels |
| HCSPRS9030 | Recruitment User | RS Web Libraries |
| HCSPRS9040 | Recruitment User | RS Standard CIs |

Appendix C

PeopleSoft Talent Acquisition Manager Reports

PeopleSoft Enterprise Talent Acquisition Manager supplies a group of standard reports to help you manage the recruiting process.

To offer our customers more robust and complete reporting solutions, Oracle's PeopleSoft Enterprise development teams are converting some of the existing Crystal reports into XML Publisher (XMLP) format.

Oracle provides a standalone Java-based reporting technology named Oracle Business Intelligence Publisher (BI Publisher) that streamlines report and form generation. XMLP uses select features from BI Publisher that have been integrated into PeopleTools. XML Publisher for PeopleSoft Enterprise provides native XMLP technology for PeopleSoft Query and Connected Query, as well as any PeopleSoft application.

XMLP separates the data extraction process from the report layout. XMLP provides the ability to design and create report layout templates with the more common desktop applications of Microsoft Word and Adobe Acrobat, and renders XML data based on those templates. With a single template, you can generate reports in many formats (PDF, RTF, Excel, HTML, and so on) and in many languages.

This appendix provides summary tables of Talent Acquisition Manager reports.

Note. For samples of these reports, see the PDF files published 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. (SQR) Note. This report does not support languages other than the base language. | Recruiting, Reports, Adverse Impact (USA), Adverse Impact Analysis (USA) | RUN_CNTL_REG_INTRO |
| HRS001UK Adverse Impact (UK) | Lists job offers and applications by ethnic groups and gender. (SQR) | Recruiting, Reports, Adverse Impact (UK), Adverse Impact (UK) | RUNCTL_FROMTHRU |
| HRS002 Job Group Movement Analysis | Provides racial and gender demographic data regarding your hiring process. (SQR) 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 |
| HRS003 Job Opening Status Listing | For each job opening, the report lists job information, job opening status, recruiter, the number of applicants, and expenses information. (SQR) | Recruiting, Reports, Job Opening Status, Job Opening Status | PRCSRUNCNTL |
| HRS005 Applicant Listing | This report combines job opening information with a list of candidates being interviewed for the position. It groups requisitions by Department ID. For each candidate interviewed, the report displays the following: employee ID, name, status in the interview process (active, inactive, hired, withdrawn), last interview step completed, and any offers made. (SQR) | Recruiting, Reports, Applicant Listing, Applicant Listing | PRCSRUNCNTL |

| 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 |
| HRS007 Salary Package Model | Lists applicant salary package models. (SQR) | Recruiting, Reports, Salary Package Model, Salary Package Model | HRS_RUN_PKG004_APP |
| HRS010 Vacant Budgeted Positions | Lists all vacant budgeted positions. (SQR) | Recruiting, Reports, Vacant Budgeted Positions, Vacant Budgeted Positions | RUN_HRS010 |
| HRS011 Applicant Summary by Job | For each job opening, this report lists the number of applicants and percentage of total applicants that applied, sorted by source type and specific source. (SQR) | Recruiting, Reports, Applicant Summary by Job, Applicant Summary by Job | PRCSRUNCNTL |
| HRS012 Applicant Summary by Source | Lists the number of applicants and percentage of total applicants sorted by source type and specific source. (SQR) | Recruiting, Reports, Applicant Summary by Source, Applicant Summary by Source | PRCSRUNCNTL |
| HRS013 Works Council Posting | List open job openings monitored by a Works Council. (SQR) | Recruiting, Reports, Works Council Posting, Works Council Posting | HRS_RUN_APP013 |
| HRS014 Job Posting | Shows detailed posting information for a job opening. (SQR) | Recruiting, Reports, Job Posting, Job Posting | HRS_RUN_APP014 |

| Report ID and Report Name | Description | Navigation | Run Control Page |
|--|--|--|-------------------------|
| HRS032 Full Text Vacancy Report | Generates a hard copy of the full vacancy announcement. (SQR) | Recruiting, Reports, Full Text Vacancy, Full Text Vacancy | RUN_HRS032 |
| HRS034 Job Code and Position Audit | Cross references position numbers and job codes. (SQR) | Recruiting, Reports, Job Code & Position Audit, Job Code & Position Audit | RUNCTL_FGASOFDT |
| HRS035 Application Analysis (USA) | Analyze information on recruitment and hiring practices. (SQR) | Recruiting, Reports, Application Analysis (USA), Application Analysis (USA) | RUN_CNTL_HRS035 |
| HRS036 Application Details | Displays application data for applicants. (SQR) | Recruiting, Find Applicants Select the <i>Print Application Details</i> action in the Group Action field under the Search Results grid on the Find Applicants page or other pages that support applicant actions. | HRS_RUN_HRS036 |
| HRS037 Pre-Screening Activity Report | List applicants who have been pre-screened during the online application process, and show each applicant's pre-screening results and disposition. (SQR) | Recruiting, Reports, Pre-Screening Activity Report, Pre-Screening Activity Report | HRS_RUN_HRS037 |
| HRS816 Priority Placement Table (USF) | List the valid priority placement values. (XMLP, Crystal) | Recruiting, Reports, Priority Placement Table, Priority Placement Table | PRCSRUNCNTL |
| HRS820; HRS82B, HRS82C Candidate Evaluations List (USF) | Produces an Evaluation of Candidate reports. The three different versions of the report display the same information using different sorting rules. HRS820 sorts by applicant ID, HRS82B sorts by applicant name, and HRS83C sorts by score. (XMLP, Crystal) | Recruiting, Reports, Candidate Evaluations List, Candidate Evaluations List | HRS_RUN_HRS820 |
| HRS821 Certificate of Eligibles (USF) | Generates a Certificate of Eligibles report. (XMLP, Crystal) | Recruiting, Reports, Certificate of Eligibles, Certificate of Eligibles | HRS_RUN_HRS821 |

Index

A

- accommodations 337
- accounts, bank
 - entering information 337
- accounts, resume email
 - processing emails 177
 - selecting resumes 180
 - setting up 177, 178
 - understanding 177
 - viewing lists 180
- Add Bank Account page 333
- Add Citizenship page 333
- Add Contact Note page 578
- Add Expenses page 526, 534, 568
- Add National ID page 333
- Add New Applicant page: Applications section 310, 312
- Add New Applicant page: Contact Details section 305
- Add New Applicant page: Eligibility & Identity section 333, 334
- Add New Applicant page: Verification section 330
- Add Note page 526, 533, 576
- Add Person of Interest page 619, 620
- Add Priority Placement page 312
- Add Reference Details page 330
- Add Screening Levels page 264, 269
- Add Team page 284
- Add Visa Permit Details page 333
- Add Work Experience page 312
- Advanced Keyword Search page 545, 547
- Adverse Impact Analysis report (UK) 718
- Adverse Impact Analysis report (USA) 718
 - internet applicant reporting 718
- agents, job
 - defining days active 19
 - running 631
- Answer Definition page 64
- answer definitions 64
- Applicant Checklist page 617
- applicant contracts
 - defining basic information 499
 - defining contract clauses 501
 - defining signature dates and probation information 503
 - understanding 498
- applicant data
 - application details 309
 - contact information 305
 - eligibility and identity information 332
 - record creation 299
 - references 330
- applicant data security
 - setting up data access 87
- Applicant Listing 634
- Applicant Listing report 718
- Applicant List page 610, 613
- applicant lists
 - adding applicants 616
 - creating 612
 - editing 615
 - managing 613
 - understanding 609
 - viewing 611
- Applicant Lists page 610, 611
- applicant records
 - merging duplicates 620
- applicant referrals
 - See Also* employee referral programs, 670
- Applicant Resume page 568
- applicants
 - activity tracking 566
 - applications 309, 580
 - checklists 616
 - contact information 305
 - contact notes and attachments 575
 - contracts 498
 - correspondence 591
 - dispositions, changing 571
 - eligibility and identity information 332
 - external trainees 618
 - forwarding 602
 - hiring 504
 - interviewing 423
 - job offers 469
 - linking to job openings 323, 585
 - lists 609
 - merging duplicates 620
 - pre-employment checks 495
 - references 330
 - route 419
 - routing 417
 - salary packages 504
 - screening 377
 - searching for 347
 - selectees for Japan 566
 - statuses, changing 608
 - statuses, selecting 308
- applicant screening *See Also* screening
- applicant searches
 - building the collections 344
 - database searches 350
 - entering advanced criteria 358
 - entering keyword criteria 354
 - reviewing results 353, 357, 358
 - running automatch searches 375
 - saving search criteria 371
 - understanding 339
- Applicants page - Recruiting Installation component 11, 17
- applicant statuses
 - changing 608
 - selecting 308
- Applicant Summary by Job page 634
- Applicant Summary by Job report 719
- Applicant Summary by Source page 634
- Applicant Summary by Source report 719
- applicant type 300
 - defining for sites 92
- Application Analysis (USA) report 720
- Application Details (printer-friendly) page 589
- Application Details page 311, 313

- Application Details report 720
- applications
 - adding information 311
 - creating 309, 580
 - editing 580
 - entering 312
 - entering details 313
 - printing 588
 - setting up attachments 97
 - viewing 581
- Application Summary page 679, 686
- approvals
 - activating 14
 - employee referrals 688
 - job openings, adding approvers or reviewers 298
 - job openings, approving 296
 - pending, viewing 296
 - understanding job offer process 485
 - understanding job opening process 291
- Approve Employee Awards page 691, 692
- approvers
 - adding to job offers 493
 - adding to job openings 298
- Assigned Mapping Setup page 166, 167
- Assign Profile Type Defaults page 27
- attachments
 - adding to applicants 320
 - adding to contact notes 575
 - adding to job openings 530
 - defining types 98
 - understanding types 97
- Attachment Type Setup page 98
- Australia
 - copying to human resources 515
 - creating salary packages 504
- Automatch Results page 371
- automatch searches
 - running 375
- AutoScreen - AutoScreen Setup page 185
- autoscreening
 - defining for sources 191
 - setting up 185
- AutoScreen Setup page 183
- Award Category Rule page 657
- award category rules
 - creating SQL rules 661
 - naming and describing 660
 - processing 674, 677
 - setting up schedules 661
- Award Category Rules page 656, 660
- Award Overrides page 679, 688
- award payment statuses 675
- award rules
 - creating SQL rules 661
 - naming and describing 660
 - processing 674, 677
 - setting up schedules 661
- awards
 - approving referrals 688
 - overriding referrals 678
- Award Schedule page 657, 661, 696, 699
- Awards page - Administer Referrals 678, 682

B

- background checks
 - requesting 496
 - understanding 495
- background screeners
 - setting up 158
 - setting up vendors 158
 - understanding integration 155
- bank accounts
 - adding 333
 - entering information 337
 - updating 333
- Browse Job Opening page 518
- Browse Job Openings page 521
- Build Applicant Index
 - understanding 340
- Build Applicant Index page 343, 344
- Build Job Index page 543
- Build Manager List page 344
- business processes 1

C

- calendars, interview 466
- Candidate Evaluations List report 720
- Candidate Gateway
 - activating 10
- Candidate Name Requests page 228, 238
- candidate names
 - assigning to job openings 238
- catalog, text 1
- categories
 - interview evaluations 102
- Category Setup page 166, 167
- Certificate of Eligibles page 410, 416
- Certificate of Eligibles report
 - description 720
 - generation 411
- channels
 - setting up 157
 - understanding 635
- checklists
 - creating 617
 - understanding 616
- citizenship
 - adding 333
 - updating 333
- citizenship information
 - entering 336
- clauses, contract 501
- Clone Job Opening page 290, 291
- cloning job openings
 - cloning 291
- collections
 - applicant 344
 - external job postings 543, 544
- Comments page 432
- community background information
 - understanding 121
- company locations
 - adding additional to job openings 236
 - adding to recruiting locations 93
 - assigning to job opening 232
- Company page 183, 187
- Compare Results page 349
- competencies
 - assigning 277

- competitive statuses
 - assigning 410
- Compliant Results 371
- components
 - creating 106
 - understanding 103
- component types
 - adding to components 106
 - creating 105
 - understanding 103
- configuration files 159
- Configure Direct Reports UI page 33
- Confirm Referral - Access page 671
- Confirm Referral - Referral Cancelled page 672
- Confirm Referral - Submit Confirmation page 671
- Confirm Referral page 671
- contact information
 - entering 305
 - understanding 305
- contact methods
 - setting up types 100
- Contact Methods page 100
- contact notes
 - understanding 575
 - viewing history 577
- contacts
 - assigning to sources 192
 - defining information for 184
 - defining method types 100
- Contacts - Contact Setup page 184
- contacts, recruitment
 - selecting on job openings 234
- Contact Setup page 183
- Contacts page 183, 192
- Content Section Configuration page 70
- continuous job opening
 - definition 206
- continuous job openings
 - activating approvals 14
 - assigning to job openings 218
 - defining default template 14
 - understanding 216
- continuous job postings
 - selecting on recruitment templates 151
- Contract Clause page 499, 501
- contracts
 - defining basic information 499
 - defining contract clauses 501
 - defining signature dates and probation information 503
 - understanding 498
- Contract Status/Content page 498, 499
- correspondence
 - sending 591, 597
- counters 23
- Country Specific page 122, 126
- Create Job from Position (HRS_CRJOB) process
 - running 290
 - understanding 287
- Create Job Openings from Positions page
 - 289, 290
- Create New List page 610, 612
- Criteria page - Employee Referral Program 664

D

- data mapping
 - creating assignments 167
 - mapping keys 171
 - mapping postal data 174, 175
 - mapping unmapped data 170
 - mapping values 173
 - setting up categories 167
 - understanding 164
 - viewing key lists 168
 - viewing value lists 169
- Datamapping Sync process 164
- data permission security
 - setting up applicant data access 87
- dates
 - signature 503
- defaults
 - recruiting 10
 - system 9
- Define Screening Points page 264, 277
- disabilities
 - entering 337
- Disposition Details - Route page 419
- Disposition Details page 508, 509, 568, 571
- dispositions
 - changing for applicants 571
 - making final recommendations 460
 - viewing for applicants 568
- Duplicate Applicant Merge (HRS_DUPE_MRG)
 - process
 - running 628
 - understanding 621
- duplicate applicants
 - defining search criteria 626
 - initiating process 625
 - merging 628
 - understanding 620, 621

E

- Edit Bank Account page 333
- Edit Citizenship page 333
- Edit National ID page 333
- Edit Primary List Information page 610, 615
- Edit Reference Details page 330
- Edit Visa Permit Details page 333
- Edit Work Experience page 312
- education
 - entering job opening requirements 249
- Effects of Status Change page 49, 54
- eligibility information
 - entering 334
- Eligibility Overrides page 679, 687
- Eligibility page - Administer Referrals 678, 680
- eligibility rules
 - creating SQL rules 658
 - naming 658
 - processing 672, 677
- email
 - sending 591, 597
- email accounts, resume
 - processing emails 177
 - selecting resumes 180
 - setting up 177, 178
 - understanding 177
 - viewing lists 180
- email addresses

- preferred 601
- Email Checking Process 177
- Email List page 178, 180
- Email Setup page 178
- Employee Eligibility Rule page 657
- employee eligibility rules
 - creating SQL rules 658
 - naming 658
 - processing 672, 677
- Employee Eligibility Rules page 656, 658
- Employee Referral Program 657
- Employee Referral Program - Criteria page 657
- Employee Referral Program - Rules page 657
- Employee Referral Program (HRS_ERP_MAIN)
 - process
 - running 677
 - understanding 672
- employee referral programs
 - administering hot jobs 694
 - approving awards 688
 - associating to job openings 234
 - creating 663
 - defining additional criteria 664
 - defining awards 660
 - defining award schedules 661
 - defining eligibility rules 658
 - entering referrals manually 324
 - overriding award details 683
 - overriding awards 678
 - overriding duplicate referrals 686
 - overriding employee eligibility 680
 - overview 653
 - paying awards 688
 - processing eligibility and awards 672, 677
 - selecting eligibility and award category rules 666
 - selecting on recruitment templates 151
 - setting up 654
 - setting up award schedules 661
 - setup overview 654
 - understanding payment statuses 675
 - viewing awards 682
 - viewing eligibility by application 686
 - viewing referral summaries 679
- Employee Referral Programs page - Employee Referral Program 663
- Employee Referral Programs page - Process Referral Programs 691
- employee referrals
 - See Also* employee referral programs
 - understanding 669
- employee verification
 - activating 18
 - processing 511
 - reviewing results 512
 - understanding 504
- employment history
 - entering 325
- Enter Primary Job Opening page 217, 218
- Evaluate OE Answers page 381
- Evaluate Open Ended Questions page 381
- Evaluation Rating Comments page 451
- evaluations, interview
 - completing 451
 - creating categories 102
 - creating interview types 102
 - creating ratings 103
 - sending reminders 457

- setting up templates 144
- specifying default template 14
- understanding 448
- understanding setup 101
- expenses
 - adding to job openings 530, 534
- external job postings
 - assigning titles to job openings 279
 - defining days to display 17
 - managing 548
 - posting, updating, unposting 549
 - reviewing integration log 552
 - reviewing posting history 551
 - searching for 544
 - setting up 94
- External Posting History page 549, 551
- external trainees
 - adding 620
 - enabling search/match functionality 18
 - understanding 618
- extractors *See* resume extractors

F

- features 1
- files, configuration 159
- final recommendations 459
- Find Applicant Duplicates (HRS_DUPE_PRC)
 - process
 - running 626
 - understanding 621
- Find Applicants page 349, 350, 354, 358, 450, 473, 508
- Find Duplicate Applicants page 624, 626
- Find Email Address page 596, 601
- Find Job Openings page 518, 526
- Forward Applicant page 603
- Forward Applicant Preview page 603
- forwarding applicants 602
- Full Text Vacancy report 720

G

- gender information 124
- General page - Recruiting Installation component 10, 11
- Generate Recruitment Letters page 596, 602

H

- hire applicants
 - enabling search/match functionality 18
 - reviewing search/match results 512
 - setting up 107
 - submitting hire requests 509
 - understanding 504
- hiring managers
 - assigning to job openings 286
 - creating teams 284
 - reviewing interview schedules 466
- hiring process
 - enabling search/match functionality 18

- reviewing search/match results 512
 - setting up 107
 - submitting hire requests 509
 - understanding 504
 - Hot Job History page 697
 - hot jobs
 - administering 695
 - defining selection criteria 697
 - naming and describing categories 697
 - removing selected job openings 698
 - setting up award schedules 699
 - understanding 694
 - Hot Jobs page 696, 697
 - HRS_AM process
 - running 375
 - HRS_APP_RTE 420
 - HRS_CRJOB process
 - running 290
 - understanding 287
 - HRS_DM_SYNC process 164
 - HRS_DUPE_MRG process
 - running 628
 - understanding 621
 - HRS_DUPE_PRC process
 - running 626
 - understanding 621
 - HRS_ERP_MAIN process
 - running 677
 - understanding 672
 - HRS_FORWARD_APPLICANT 602
 - HRS_HROI_DRAFT 191, 649, 651
 - HRS_HROI_EML process 177
 - HRS_HROI_REJECT 191, 649, 651
 - HRS_HROI_SUCCESS 191, 649, 651
 - HRS_HROI_UNRESOLVED 191, 649, 651
 - HRS_INT_EVAL process 457
 - HRS_INTVW_EVAL_RMNDR 457
 - HRS_INTVW_SCHED_TEAM 441
 - HRS_INTVWSCHED_APPL 439
 - HRS_JOB_AGNT process 633
 - defining days active 19
 - running 633
 - understanding 632
 - HRS_JSCH_IDX process
 - running 543
 - understanding 544
 - HRS_PRCES_EML process 177
 - HRS_RESLOAD process
 - running 642
 - understanding 640
 - HRS_SRCH_IDX process
 - running 344
 - HRS_UPDATE_REFERENCES 331
 - human resources
 - selecting recruiting data to transfer 107
- I**
- identification numbers
 - specifying system assigned numbers 21
 - identity information
 - entering 334
 - ID numbers
 - specifying system assigned numbers 21
 - implementation
 - defaults 9
 - recruiting defaults 10
 - Setup Manager 4
 - Inbound Map page 166, 174
 - incoming messages
 - job postings 551
 - reviewing 552
 - Insert additional approver or reviewer page 296, 298, 490, 493
 - installation
 - defaults 9
 - recruiting defaults 10
 - Setup Manager 4
 - installation defaults 11
 - Installation table 9
 - integration
 - background screeners setup 158
 - data mapping 164
 - job board setup 156
 - OIF overview 155
 - Payroll for North America 688
 - recruitment sources 181
 - resume email accounts 176
 - resume extractor setup 157
 - transaction log 193
 - vendor setup 158
 - integration log
 - managing external job postings 552
 - Integration Log page 193
 - Integration Outgoing Messages page 193
 - integration point
 - employee referral programs 690
 - integrations
 - overview 4
 - integration transaction log
 - reviewing 193
 - interested parties
 - adding to applicants 578
 - assigning to job openings 286
 - creating teams 284
 - internal recruitment type
 - assigning to job openings 234
 - internet applicant
 - reporting compliance 718
 - Interview Calendar page 463, 466
 - interview calendars 466
 - Interview Data Change page 432, 445
 - Interview Details - Interview Evaluation page 451
 - interviewers
 - assigning to job openings 286
 - creating teams 284
 - Interview Evaluation and Final page 458
 - Interview Evaluation Category page 102
 - Interview Evaluation Ratings page 102, 103
 - Interview Evaluation Reminder (HRS_INT_EVAL) process 457
 - interview evaluations
 - completing 451
 - creating categories 102
 - creating interview types 102
 - creating ratings 103
 - reviewing 462
 - sending reminders 457
 - setting up templates 144
 - specifying default template 14
 - understanding 448
 - understanding setup 101
 - Interview Evaluation Template page 145, 146
 - interview evaluation templates

- creating 146
- defining default template 14
- selecting on recruitment templates 152
- understanding 144
- Interview Facilities page 423
- Interview List page 433, 448
- Interview Note page 433
- Interview Request page 446
- interviews
 - completing evaluations 448
 - making final recommendations 459
 - reviewing schedules 462
 - scheduling 425
 - setting up 14, 101
 - setting up templates 144
- Interview Schedule - Applicant Availability page 432, 444
- Interview Schedule - Interviewer Availability page 432, 444
- Interview Schedule page 432, 433
- interview schedules
 - reviewing calendars 466
 - reviewing for applicants 463
 - understanding 462
- interview types 102
- Interview Types page 101, 102
- Ireland
 - community background information 121, 126

J

- Japan
 - tracking selectees 566
- Job Agent (HRS_JOB_AGNT) process 19, 633
 - running 633
 - understanding 632
- JobAgentNotification 632
- job agents
 - defining days active 19
 - defining maximum number 19
 - running 631
- job applications
 - creating 309, 580
 - editing 580
 - entering 312
 - entering details 313
 - setting up attachments 97
 - viewing 581
- job boards
 - posting job openings 549
 - reviewing posting history 551
 - setting up 156
 - setting up vendors 158
 - understanding integration 155
- Job Code and Position Audit report 720
- job collections
 - building 543
- Job Description page 278
- Job Group Movement Analysis page 634
- Job Group Movement Analysis report 718
- JobOfferApproval 701
- JobOfferApproved 702
- JobOfferDeny 702
- JobOfferError 703
- JobOfferEscalation 704
- JobOfferReview 704
- job offers
 - activating approvals 14
 - adding approvers 493
 - approving 491
 - creating 473
 - editing and deleting 493
 - setting up 103
 - setting up component types 105
 - understanding 469
 - understanding approval process 486
 - viewing pending approvals 490
- JobOfferTermination 705
- Job Opening - Job Approvals page 296
- Job Opening - Job Opening Screening Criteria page 270
- JobOpeningApproval 705
- JobOpeningApproved 706
- Job Opening Cost Analysis report 719
- JobOpeningDeny 707
- JobOpeningError 707
- JobOpeningEscalation 708
- Job Opening page 228, 242, 247, 278, 283, 508
 - Adding job qualifications 248
 - Adding screening questions 253
 - Screening Questions section 253
 - Screening section 264
- Job Opening page: Activity & Attachments tab 526, 530
- Job Opening page: Approvals tab 295
- Job Opening page: Find Applicants tab 526
- Job Opening page: Job Opening Details tab 526, 535
- Job Opening page: Manage Applicants tab: View Applicants section 526, 527
- Job Opening page: Screening 265
- job opening posting templates
 - creating 138
 - selecting on recruitment templates 151
 - understanding 137
- Job Opening Printable Details page 536, 538
- JobOpeningReview 708
- job openings
 - activating multiple job codes 16
 - approving 291
 - browsing 521
 - candidate name requests 238
 - changing recruitment template 231
 - cloning 291
 - creating 215
 - creating from open positions 290
 - creating postings 279
 - denying 298
 - details, reviewing 535
 - entering details 228
 - entering primary information 218
 - expenses 534
 - external posting management 548
 - linking applicants 323, 585
 - managing 517, 525
 - notes 533
 - printing 535
 - pushing back 298
 - recruiting locations 233
 - reviewing activity 530
 - reviewing applicants linked to 527
 - screening criteria, adding 270
 - setting up applicant data access 87
 - templates 130

- understanding 216
 - viewing pending approvals 296
- Job Openings (hot jobs) page 696
- Job Opening Screening Criteria page 264
- Job Openings page 698
- job opening statuses
 - overriding 233
- Job Opening Status Listing report 718
- Job Opening Template page 134
- job opening templates
 - defining 134, 135
 - defining defaults 14
 - prerequisites for set up 134
 - selecting on recruitment templates 151
 - understanding 130
- JobOpeningTermination 709
- job posting collections
 - understanding 544
- Job Posting report 719
- job postings
 - assigning titles to job openings 279
 - defining days to display 17
 - managing 548
 - posting, updating, unposting 549
 - reviewing integration log 552
 - reviewing posting history 551
 - searching for 544
 - setting up 94
- job posting searches
 - building the job collections 543
 - entering criteria 545, 547
 - reviewing results 547
 - understanding 544
- job posting templates
 - creating 138
 - understanding 137
- job requirements
 - assigning to job openings 228
- job search agent
 - prerequisites 633
 - running 631
 - setting up 19
- Job Search Agent page 633
- Jobs page - Recruiting Installation component 11, 15

K

- Key Data Mapping page 166, 171
- Key List page 166, 168

L

- Last Assigned IDs page - Recruiting Installation component 11, 21
- letters
 - job offers 473
 - sending 591, 597
 - setting up 99
- levels, screening
 - adding criteria 270
 - assigning screening points 277
 - reviewing results 401
 - reviewing scoring details 404

- running 400
 - setting up 78
 - understanding 72
- library, posting description
 - creating 96
 - defining posting types 95
 - understanding 94
- linking applicants 585
 - to job families 323
- Link to Job Opening page 586
- lists, applicant
 - adding applicants 616
 - creating 612
 - editing 615
 - managing 613
 - understanding 609
 - viewing 611
- lists, permission 713
- Load Resume - Prepare Load Parameters page 642
- locations, company
 - adding additional to job openings 236
 - adding to recruiting locations 93
 - assigning to job opening 232
- locations, recruiting
 - adding additional to job openings 236
 - assigning to job opening 233
 - defining 93
- Locations page 228, 236
- log, integration
 - managing external job postings 552
- log, transaction
 - reviewing 193

M

- Manage Applicant - Applicant Activity: Interview Schedule/Evaluation page 463
- Manage Applicant - Disposition Details: Interview page 460
- Manage Applicant - Disposition Details: Offer page 493
- Manage Applicant - Disposition Details page 490, 491
- Manage Applicant page: Applicant Activity tab 568
- Manage Applicant page: Applicant Activity tab: Interview Schedule/Evaluation section 463
- Manage Applicant page: Applicant Data tab 581
- Manage Applicant page: Applicant Data tab: Applications & Resumes section 310
- Manage Applicant page: Applicant Data tab: Contact section 305
- Manage Applicant page: Applicant Data tab: Eligibility & Identity section 333
- Manage Applicant page: Applicant Data tab: Verification section 330
- Manage Applicant page: Contact Notes tab 576, 577
- Manage External Postings page 549
- Manage Hire Setup - Person page 107
- Manage Resumes - Select Resume page 646
- Marketing page 183, 188
- Match Result page 349
- merit promotion recruitment type
 - assigning to job openings 234

multiple jobs
 activating 16
 My Referrals page 671

N

national IDs
 entering 336
 nation ID
 adding 333
 updating 333
 non-employee 300
 Non-person Profile page 217
 noncompetitive statuses
 assigning 410
 notes
 adding to job openings 530, 533
 understanding 575
 viewing history 577
 notifications
 delivered templates 710
 delivered workflows 701
 HRS_APP_RTE 420
 HRS_FORWARD_APPLICANT 602
 HRS_HROI_DRAFT 191, 649, 651
 HRS_HROI_REJECT 191, 649, 651
 HRS_HROI_SUCCESS 191, 649, 651
 HRS_HROI_UNRESOLVED 191, 649, 651
 HRS_INTVW_EVAL_RMNDR 457
 HRS_INTVW_SCHED_TEAM 441
 HRS_INTVWSCHED_APPL 439
 HRS_UPDATE_REFERENCES 331
 JobOfferApproval 701
 JobOfferApproved 702
 JobOfferDeny 702
 JobOfferError 703
 JobOfferEscalation 704
 JobOfferReview 704
 JobOfferTermination 705
 JobOpeningApproval 705
 JobOpeningApproved 706
 JobOpeningDeny 707
 JobOpeningError 707
 JobOpeningEscalation 708
 JobOpeningReview 708
 JobOpeningTermination 709

O

OFCCP compliance 532
 Offer Component page 105, 106
 Offer Component Type page 105
 offers, job
 adding approvers 493
 approving 491
 creating 473
 editing and deleting 493
 setting up 103
 understanding 469
 understanding approval process 486
 viewing pending approvals 490
 OIF *See Also* Open Integration Framework (OIF)
 Online Job Offers - Select Regulatory Regions page
 11, 20

open competition recruitment type
 assigning to job openings 234
 Open Integration Framework - Integration Log page
 193, 549, 552, 646
 Open Integration Framework (OIF)
See Also integration
 understanding 155, 635, 636
 open positions
 creating job openings from 290
 Organizational Level Documents page 473, 482
 Outbound Map page 166, 175
 outgoing messages
 job postings 551, 552
 overview 1

P

packages, salary
 copying to human resources 515
 creating 504
 payment statuses 675
 Payroll for North America
 editing rejected awards 694
 paying awards 693
 understanding integration 689
 viewing rejected awards 694
 Pending Approvals page 295, 296, 490
 PeopleSoft Enterprise Payroll for North America
 editing rejected awards 694
 paying awards 693
 understanding integration 689
 viewing rejected awards 694
 permission lists 713
 setting up applicant data access 87
 permits, visa
 entering information 336
 Person Profile page 217
 persons of interest
 adding 620
 enabling search/match functionality 18
 understanding 618
 POIs *See* persons of interest
 positions
 creating job openings from 290
 Posting Description Library page 95, 96
 posting descriptions
 creating 96
 creating library 96
 defining types 95
 understanding 94
 Posting Description Type page 95
 Posting Information page 278, 279
 postings, job
 assigning titles to job openings 279
 managing 548
 posting, updating, unposting 549
 reviewing integration log 552
 reviewing posting history 551
 searching for 544
 setting up 94
 Posting Template page 138
 Post Online Job Offer page 473, 484
 Pre-employment Check Details page 496
 Pre-employment Check page 496
 pre-employment checks
 requesting 496

- setting up vendors 158, 162
 - understanding 495
- Pre-Employment Vendor Setup page 159, 162
- Pre-Screening Activity report 720
- Prepare For Hire page 508, 509
- Prepare Job Offer page 473
- Pre Screening page 123
- Print Application Details page 589
- printing
 - applications 588
 - job openings 535
- priority placement
 - adding 312
 - assigning to job openings 235
 - editing 326
 - setting up 84
 - understanding 81
- Priority Placement page 83, 84
- probation information 503
- Process Awaiting Email process 177
- Process Duplicate Applicants page 624, 625
- processes
 - resume extraction 637
- processes, Application Engine
 - Create Job from Position (HRS_CRJOB) 287, 290
 - Datamapping Sync (HRS_DM_SYNC) 164
 - Duplicate Applicant Merge (HRS_DUPE_MRG) 621, 628
 - Email Checking (HRS_HROI_EML) 177
 - Employee Referral Program (HRS_ERP_MAIN) 672, 677
 - Find Applicant Duplicates (HRS_DUPE_PRC) 621, 626
 - Interview Evaluation Reminder (HRS_INT_EVAL) 457
 - Job Agent (HRS_JOB_AGNT) 19, 632, 633
 - Process Awaiting Email (HRS_PRCES_EML) 177
 - Resume Load Process (HRS_RESLOAD) 640, 642
 - Run Automatch Search (HRS_AM) 375
 - Verity Applicant Index Build (HRS_SRCH_IDX) 344
 - Verity Job Posting Index Build (HRS_JSCH_IDX) 543, 544
- processes, business 1
- Process Priority Placement page 384
- Process Referral Programs 677
- Process Referral Programs page 677
- products
 - selecting on Installation table 9
- Products page 10
- profiles, searching 363
- proxy
 - defining contact information 184
 - setting up 193
 - understanding 636
- Proxy Details page 576

Q

- Question Answers page 64, 68
- Question Definition page 64, 65
- question definitions 65
- questionnaires

- assigning to job openings 254
 - overview 61
 - setting up 64
 - setting up answer definitions 64
 - setting up question definitions 65
 - setting up question set definitions 66
- questions, screening
 - assigning to job openings 254
 - setting up answer definitions 64
 - setting up question definitions 65
 - setting up question set definitions 66
- Question Set Definition page 64, 66
- question set definitions 66

R

- Rank Applicants (details) page 410
- Rank Applicants page 410
- ranking applicants
 - ranking 411
- Rate Applicant page 386, 389
- ratings
 - creating for interview evaluations 103
- recommendations, final 459
- records
 - merging duplicates 620
- Recruiter Roles page 89
- recruiters
 - assigning to job openings 286
 - creating teams 284
 - defining roles 89
 - reviewing interview schedules 466
- Recruiting Installation - Applicants page 11, 17
- Recruiting Installation - General page 10, 11
- Recruiting Installation - Jobs page 11, 15
- Recruiting Installation - Last Assigned IDs page 11, 21
- recruiting locations
 - adding additional to job openings 236
 - assigning to job opening 233
 - defining 93
- Recruiting Locations page 93
- recruiting products
 - selecting on Installation table 9
- recruiting statuses
 - effects of status changes 37
 - how to set up 37
 - setting up 48
 - types of 35
 - understanding 35
- recruiting teams
 - assigning to job openings 286
 - creating 284
- recruiting templates
 - interview evaluation 144
 - job opening 130
 - job opening posting 137
 - overview 113
 - recruitment 149
 - screening 140
- recruiting vendors *See* vendors
- recruitment contacts
 - assigning to sources 192
 - defining 184
 - selecting on job openings 234
- recruitment letters

- setting up 99
- Recruitment Profile Match page 349, 363
- recruitment sources
 - defining company details 187, 188
 - defining contacts 192
 - defining marketing details 188
 - defining recruiting contacts 184
 - defining vendor details 189
 - selecting source types 186
 - understanding 181
- Recruitment Template page 150
- recruitment templates
 - assigning segmentation values 152
 - changing on job openings 231
 - creating 150
 - defining defaults 14
 - understanding 149
- recruitment types
 - assigning to job openings 234
- references
 - adding 330
 - requesting 330
 - understanding 330
 - updating 330
- Refer Friend - Choose Resume page 671
- Refer Friend - Contact Details page 671
- Refer Friend - Enter Resume Text page 671
- Referral Administration page 678, 679
- Referral Award Details page
 - 679, 683, 691, 692, 694
- referrals *See Also* employee referral programs
- referral sources
 - specifying for applicants 324
- Reject Applicant page 607
- Rejected Awards page 692, 694
- reminders, interview 457
- reports
 - Adverse Impact Analysis (UK) 718
 - Adverse Impact Analysis (USA) 718
 - Applicant Listing 718
 - Applicant Summary by Job 719
 - Applicant Summary by Source 719
 - Application Analysis (USA) 720
 - Application Details 720
 - Candidate Evaluations List 720
 - Certificate of Eligibles 720
 - Full Text Vacancy Report 720
 - Job Code and Position Audit 720
 - Job Group Movement Analysis 718
 - Job Opening Cost Analysis 719
 - Job Opening Status Listing 718
 - Job Posting report 719
 - overview 717
 - Pre-Screening Activity 720
 - Salary Package Model 719
 - Vacant Budgeted Positions 719
 - Works Council Posting 719
- requirements, job
 - assigning to job openings 228
- resume email accounts
 - processing emails 177
 - selecting resumes 180
 - setting up 177, 178
 - understanding 177
 - viewing lists 180
- resume extraction
 - specifying default extractors 93
- resume extractors
 - extracting data 637
 - loading resumes 640, 643
 - managing resumes 645
 - setting up 157
 - setting up vendors 158
 - specifying for sources 192
 - understanding channels 635
 - understanding integration 155
- Resume Load Process (HRS_RESLOAD)
 - running 642
 - understanding 640
- resume management *See* resumes
- Resume Management - Select Resume page 646
- Resume Management Details page 646, 649
- resumes
 - adding for applicants 320
 - extracting data 637
 - loading 640
 - managing 645, 646
 - printing 320
 - setting up email accounts 176
 - setting up extraction 157
 - setting up templates 115
 - statuses 191, 638, 644, 645, 648
 - understanding channels 635
 - viewing 650
 - viewing details 649
 - viewing for applicants 568, 570
- resumes statuses
 - assigning to loaded resumes 644
 - specifying for sources 191
 - understanding 638
 - viewing 645, 648
- resume templates
 - community background information 121, 126
 - defining basic information 123
 - defining for sites 92
 - defining pages and sections 123
 - delivered sections 119
 - selecting and merging 117
 - selecting on recruitment templates 151
 - understanding 115
- Resume Text Printable Version page 311
- Review Duplicate Applicants page 624, 628
- Review Duplicate Referrals page 679, 686
- reviewers
 - adding to job offers 493
 - adding to job openings 298
- Review Referral page 672
- roles
 - delivered 713
 - recruiters 89
- Route Applicant - Route Applicant page 419
- Route Applicant page 418
- routing applicants 417
- row security permission lists
 - setting up applicant data access 87
- rules
 - award categories 674, 677
 - employee eligibility 672, 677
 - employee eligibility and award category 666
- Rules page - Employee Referral Program 666
- Rule SQL page - Award Category Rules 656, 661
- Rule SQL page - Employee Eligibility Rules 656, 658
- Run Automatch Search (HRS_AM) process
 - running 375
- Run Automatch Search Agent page 371, 375

S

- salary information
 - assigning to job openings 245
- Salary Package Model report 719
- salary packages
 - copying to HR 515
 - copying to human resources 515
 - creating 504
- saved applicant searches
 - entering criteria 371
- saved searches
 - audit trail 532
- Saved Searches page 371
- Save Search (criteria) page 370
- Save Search (results) page 370
- Save Search page 371
- schedules
 - defining for hot jobs 699
- schedules, interview
 - reviewing calendars 466
 - reviewing for applicants 463
 - understanding 462
- Screen Applicants - Rank Applicants page 411
- Screen Applicants page 384, 386, 400
- screeners *See* background screeners
- screening
 - adding criteria to screening levels 270
 - adding screening points to screening criteria 277
 - assigning competitive and noncompetitive statuses 410
 - setting up 72
- Screening Applicants - Screening Details page 404
- screening criteria
 - adding to job openings 270
 - assigning screening points 277
 - assigning to job openings 268
- Screening Criteria page 395, 398
- Screening Definition page 77, 78
- screening definitions
 - setting up 78
 - understanding 72
- Screening Details page 395
- screening levels
 - adding criteria 270
 - assigning screening points 277
 - reviewing results 401
 - reviewing scoring details 404
 - running 400
 - setting up 78
 - understanding 72
- Screening Levels page 395, 396
- screening questions
 - assigning to job openings 254
 - overview 61
 - setting up answer definitions 64
 - setting up question definitions 65
 - setting up question set definitions 66
 - understanding 61
- Screening Results - View Screening Results page 401
- Screening Results page 395, 410
- Screening Template page 141
- screening templates
 - creating 141
 - selecting on recruitment templates 151
 - understanding 140
- search/match
 - adding persons of interest 619, 620
 - enabling 18
 - hiring process 504, 511
 - reviewing results 512
- searches
 - See* applicant searches, job opening searches
 - external job postings 544
- Search Postings - Basic Search page 545
- search results, limiting 17
- Search Results page 508, 620
- security 1
 - setting up applicant data access 87
- segmentation
 - assigning to recruitment templates 152
 - defining default type 13, 114
- Segmentation Values page 150, 152
- Select Applicant List page 611, 616
- selectees, tracking 566
- Selection page - Hot Job Administration 696, 697
- Select Job Opening for Interview page 431
- Select Job Opening Sections page 536
- Select New Applicant Status page 608, 609
- Send Correspondence page 596, 597
- Send Correspondence Preview page 596
- Setup Manager 4
- Setup Veterans Preference page 84, 85
- Signature Date/Probation Info page 499, 503
- signature dates 503
- site IDs *See* sites, sites
- sites
 - defining default 19
 - loading resumes 644
 - setting up 91
 - specifying for sources 187, 188
 - understanding 90
- Site Setup page 91
- sources
 - defining company details 187
 - defining contacts 192
 - defining marketing details 188
 - defining vendor details 189
 - loading resumes 644
 - selecting source types 186
 - understanding 181
- Source Setup page 183, 186
- SQL
 - award categories 661
 - eligibility rules 658
 - viewing 656, 657, 696
- staffing information
 - assigning to job openings 243
- standard requisition
 - definition 206
- standard requisitions
 - activating approvals 14
 - assigning to job openings 218
 - defining default template 14
 - selecting on recruitment templates 151
 - understanding 216
- Status Area page 49, 52
- statuses *See Also* recruiting statuses
 - changing for applicants 608
 - competitive 410
 - noncompetitive 410
 - overriding job opening 233

- payment 675
- Resume Load Process 643
- resumes 191, 638, 644, 645, 648
- selecting for applicants 308
- Statuses and Reasons page 49
- Status Successors page 49, 53

T

- Talent Acquisition Manager
 - activating 10
- teams
 - creating 284
- Teams page 283, 284
- Template Definition page 122, 123
- templates
 - defining defaults 14
 - delivered notifications 710
 - recruiting 113
- templates, resume
 - community background information 121, 126
 - defining basic information 123
 - defining for sites 92
 - defining pages and sections 123
 - delivered sections 119
 - selecting and merging 117
 - understanding 115
- Template Sections page 122, 123
- Template Structure page 134, 135
- text catalog 1
- tie breakers
 - applying 411
 - candidate names 238
- tracking applicants 566
- trainees, external
 - adding 620
 - enabling search/match functionality 18
 - understanding 618
- transaction log
 - reviewing 193
- transfer data to HR
 - set up 107

U

- Unmapped Data page 166, 170

V

- Vacant Budgeted Positions report 719
- Value Data Mapping page 166, 173
- Value List page 166, 169
- Vendor page 183, 189
- vendors
 - defining pre-employment settings 162
 - linking to recruitment sources 190
 - loading configuration files 159
 - setting up background screeners 158
 - setting up job boards 156
 - setting up resume extractors 157
 - understanding integration 155
 - understanding setup steps 158

- Vendor Setup page 159
 - adding a new vendor 159
 - for existing vendors 160
- Venue Availability page 432, 444
- verification, employee
 - activating 18
 - processing 511
 - reviewing results 512
 - understanding 504
- Verity Applicant Index Build (HRS_SRCH_IDX)
 - process
 - running 344
- Verity Job Posting Index Build (HRS_JSCH_IDX)
 - process
 - running 543
 - understanding 544
- veterans preference
 - setting up 85
 - understanding 82
- View Candidate XML page 646
- View Combined Profile Information page 218, 222
- View Email Message/Attachments page 178, 180
- View Job Posting page 545
- View SQL page 656, 657, 696
- View Text ID Text Message page 264
- visa permits
 - adding 333
 - entering information 336
 - updating 333
- visas
 - entering information 336

W

- Withdraw from Hire page 509
- work experience
 - adding 312
 - entering 325
 - entering job opening requirements 249
 - updating 312
- workflow
 - delivered 701
 - JobOfferApproval 701
 - JobOfferApproved 702
 - JobOfferDeny 702
 - JobOfferError 703
 - JobOfferEscalation 704
 - JobOfferReview 704
 - JobOfferTermination 705
 - JobOpeningApproval 705
 - JobOpeningApproved 706
 - JobOpeningDeny 707
 - JobOpeningError 707
 - JobOpeningEscalation 708
 - JobOpeningReview 708
 - JobOpeningTermination 709
- works council
 - activating approvals 14
 - adding to job opening templates 131, 134
 - selecting IDs on job offers 476
 - selecting on job openings 236
 - setting up 489
 - understanding approval process 486
- Works Council Posting report 719