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Preface

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Important Note Regarding Taleo Inbox Steps and Outlook 2007

This guide contains steps for performing tasks using Taleo Inbox with Outlook 2010. Though the same tasks can be performed using Taleo Inbox with Outlook 2007, some steps differ from those described in this guide.

Taleo Inbox is a Web Service-based solution that enables users to take action on various Taleo tasks from within the Microsoft Outlook application without the need to log into Taleo applications directly.

Using Taleo Inbox, you can perform the following tasks:

- Provide feedback in response to a feedback request.
- Comment on and approve or reject feedback approval requests, succession plans, goal plans and development plans.
- Create unsolicited feedback about an employee, create feedback regarding a development activity, a goal, a competency goal, a scenario (succession plan), a job role or a competency and include the feedback in a performance review.
- View your goals and related comments, add comments and update your progress rate.
- View your development activities and related comments, add comments and update your progress rate.
- Forward an email to a Feedback Journal that can be referenced later for a performance review.
- Respond to network invitations.
- Capture candidate information from an email and create a candidate file.
- Match a candidate to a requisition.
- Look up a candidate’s contact information.
- View your tasks that have not been completed.
- If you are a manager who has direct reports, via the Manager Dashboard you can view their goals and related comments, add comments and update the progress rate for each goal.
- If you are a manager who has direct reports, via the Manager Dashboard you can view their development activities and related comments, add comments and update the progress rate for each development activity.

Benefits

- Integration with common productivity tools increases participation rates.
- Fully secure: Taleo Inbox does not use e-mails or SMTP. It is a Web service offering that uses HTTPS, so it is fully secure. Historical transactions are not stored in Outlook or on a Microsoft Exchange server.
Login

Because logging into Outlook and Taleo Inbox are separate processes, there is a specific login window for Taleo Inbox.

- First time users of Taleo Inbox, whether they have an access code or password, and regular users, log in from the window.
- Users can change their current password by entering their user ID, current password and new password in the corresponding fields.
- Users can direct the system to retain their user name and password so that they don't have to enter this information each time they log into Taleo Inbox.
- The “SSO First Time Sign In” button appears whenever the username/password is undefined and the HIDE_SSO_FIRST_TIME_SIGNIN_BUTTON is set to false in the customconfig.txt file. This button links to the TE Product for user login using the SSO approach and to define the username/password.
Configuration

A variety of configuration options can be set to customize Taleo Inbox for Outlook 2007 and 2010 in the organization.

Users can change the current interface language to another language.

Users can direct the system to scan for Taleo products. The Scan for products button enables the user to "recall" all of the Web Services if, for example, a configuration on the user's profile has changed. A scan might also be performed if there was a disruption in access either to Taleo Performance or Taleo Recruiting.

Users can choose to display or hide the Dashboard and Create Feedback buttons in the TaleoNotes toolbar and display or hide the corresponding items on the Taleo submenu of the Outlook main menu (Outlook 2007) and Add-Ins tab (Outlook 2010).

Users can choose to display or hide the Address Book and Create Candidate buttons in the TaleoNotes toolbar and display or hide the corresponding items on the Taleo submenu of the Outlook main menu (Outlook 2007) and Add-Ins tab (Outlook 2010).

If users select the Compose email option, they will be able to create and send an email to someone after searching for and selecting the person in the Inbox Address Book.

Users can specify the default language in language fields in the candidate creation process.

Users can specify the default country in country fields in the candidate creation process.

Users can specify whether the system should use Recruiter Title or Manager Title if, during the candidate creation process, users use Title as the search criterion at the Match Requisitions step.

Users can reset their user name and password if necessary.

Users can specify the address of the Taleo server used by their organization and proxy information (if a proxy is used by the organization).

Users can specify that any of the following windows, once opened, are displayed on top of all other windows until they are closed: Dashboard, Address Book, Create Candidate, Create Feedback.

Users can specify if you want the application to display Taleo Inbox icons, labels or both.

System administrators have the option of installing a custom configuration file locally once the Taleo Inbox for Outlook plug-in is installed. They can then place the same configuration file on a network drive if they want users to use the defined values of the network configuration file. The network file path will need to be added to the local configuration file so it will be read instead of the default path in the local file. The local file will need to have the network path placed for this keyword in the configuration file - CENTRALIZED_CONFIGURATION_FILE_PATH=
Proxy

Taleo Inbox for Outlook can be configured to work with a proxy used by the organization. Users can enter proxy information and perform certain actions related to proxies on their workstation:

- specify that the organization uses a proxy
- direct the application to detect the proxy
- enter the proxy server name or address and the port
- enter the user name and password required to access the proxy server
- specify that if Outlook is closed and later reopened, the user will have to provide the proxy user name and password again before gaining access to Taleo Inbox

Or the Users can let the system determine what is needed for the configuration. Most of the proxy information will be pulled from the IE settings.

The system administrator can enter much of the proxy information in the configuration file for Taleo Inbox for Outlook and then place the file on a network server.
Configuring Taleo Inbox for Outlook 2010

**Prerequisite**

Taleo Inbox must be installed on your computer.

If Outlook was open while you were installing Taleo Inbox, close Outlook after the installation procedure is completed and then perform step 1.

**Steps**

1. Open Microsoft Outlook 2010. On the Add-Ins tab of the Outlook main menu, Taleo Inbox icon is displayed.
2. From the Taleo Inbox menu item (or toolbar) open the Option window, and click the "Change Taleo Server Address" button.
3. In the Taleo – Server Address window, provide the Taleo server address used by your organization and proxy server information if your organization uses a proxy.
4. Click OK.
5. In the Option window, click 'Reset username/Password' button to open the 'User Sign in' window. Enter your user name and password in the corresponding fields.
6. Click Sign In.
   
   If you do not want this window to be displayed in future, click the check box next to Remember Me before clicking Sign In.

**Result**

On the Add-Ins tab of the Outlook main menu, sub menu items ('Dashboard', 'Create Feedback', 'Create Candidate', 'Addressbook') will be displayed depending on user permissions.
Displaying the Taleo Inbox Toolbar

Prerequisite
Taleo Inbox must be installed on your computer.

The steps in this section assume that Dashboard and Create Feedback are selected in the Taleo Performance options (in Taleo Inbox options) and Address Book and Create Candidate are selected in Taleo Recruiting options (in Taleo Inbox options).

Outlook

Steps
Click Add-Ins in the Outlook main menu.

Result
If you use Outlook 2010, the Taleo Inbox toolbar is displayed.
Creating a Candidate File from an Email

You can create a candidate file using a message sent by a candidate.

**Prerequisite**
You must have a user account in Taleo Recruiting.

You require the following user type permissions: Create candidates; Access candidate Quick and Specific search.

Acceptable formats for file attachments are: DOC, DOCX, WPD, TXT, RTF, HTM, HTML, PDF, ZIP, XLS.

*Outlook > Add-Ins*

**Steps**

1. Click the email message.
2. Click Create Candidate.
3. Indicate who sent the email by selecting the corresponding radio button.
4. Indicate whether a resume is included by clicking the appropriate item in the resume item list.
   - No resume. Select this if no resume is included in the message text or in a file attachment.
   - Message Body. Select this if the resume is included in the message text.
   - In email attachment file: Select this if the candidate resume is a file attachment. When there are multiple email attachment files, the user can use the combo box to indicate which file is the resume.
   - Load from file: Select this to load the resume from a local file.
   - Copy & Paste below: Select this to load the resume by cutting and pasting.
5. Select the language of the candidate's resume in the Candidate Resume Language drop-down list.
6. Click Next.
7. Depending on the selections you made, some or all of the candidate information fields might be automatically populated.
   a) If the email was sent by the candidate, the relevant information will be automatically extracted from the email and populated here. The information appears in red in fields.
   b) If a resume was selected earlier, the parser extracts the information and compares the candidate name, etc. with corresponding information in the email. The parser then populates fields using the information contained in the resume. Information that differs from corresponding information contained in the email is displayed in red while information that is the same is displayed in green.
   The parser cannot parse files in ZIP format.
8. You can complete fields that are missing information and can edit existing information. Mandatory fields are indicated by an asterisk.
9. Click Next.
10. Perform one of the following steps.
    - Click Next if you don't want the system to look for requisitions that are a good match for the candidate.
    - To see if any requisitions are a good match for the candidate, perform the steps described in "Matching Requisitions to a Candidate".
11. Click Next.
12. Click Finish.
Result
The candidate file is created in Taleo Recruiting. If you selected a file that uses one of the acceptable formats (including the ZIP format) during the candidate file creation procedure, the file is added to the candidate file.
Matching Requisitions to a Candidate

**Prerequisite**

You must have a user account in Taleo Recruiting.

The following user type permissions must be granted: Match requisitions to candidates; Create candidates; Access candidate Quick and Specific search.

You have completed the steps in "Creating a Candidate File from an Email" up to the "Match Requisitions" window.

You must be the owner of the requisition and its status must be Approved or Approved and Posted.

**Steps**

1. In the Search in: drop-down list, you can select All Fields, Requisition Number, Title, or Keywords.
2. In the Requisition Ownership drop-down list, you can select My Ownership, My Collaborations, My Own or Collaborations, Current Operator, or All.
3. In the Search for field in the Match Requisitions window, type the keywords you want to search for in requisitions.
   
   A search term must have at least 3 characters. Wild card characters are not supported. For example, a search for “eng” (without the quotation marks) will retrieve only requisitions whose content contains the string: eng. Users can search for multiple terms (the AND operator is applied transparently). A search for “technical writer senior” (without the quotation marks) will retrieve only requisitions whose content contains all three words “technical”, “writer” and "senior" (not necessarily one after the other).
4. Click Search.
   
   In the Search Results section, the search engine displays all requisitions that meet the search criteria.
5. Click a requisition (or CTRL-click multiple requisitions) you want to select in the Search Result list and click Add.
6. Click Next.
7. Click Source Type and make a selection.
8. Click Source and select the source by which the candidate learned about the job.
9. Click Finish.

**Result**

The candidate file is created and the requisitions you selected are matched to the file.
**Address Book**

The Taleo Inbox Address Book is used to retrieve contact information and to create and send correspondence by email.

Added is the ability for the user to use email message templates in outlook format (.oft) and utilize that template when sending correspondence to perspective candidates.
Viewing Contact Information in Address Book

**Prerequisite**

You must have a user account in Taleo Recruiting.

*Outlook > Add-Ins > Address Book*

**Steps**

1. Perform a search using the Search field.
   
   If more than one term is entered in the Search for field, the search engine applies the AND operator to all the terms. The search engine applies a wild card to both the beginning and end of a single search term that has at least 3 characters. For example, a search for “ing” (without the quotation marks) would retrieve candidates whose name was: Livingstone, Corning, Bing, Inger, among others.

   The search engine displays the names of those candidates who meet your search criteria.

2. Double-click the name of the candidate whose contact information you want to view. The candidate's contact information is displayed.
Using Address Book Template

Prerequisite

Outlook > Add-Ins > Address Book

Steps

1. Select Use template.
2. Select template from drop down menu.
3. Click Create new message.
4. Search for mail recipient.
5. Select recipient.
6. Select To, Cc, or Bcc.
7. Click Copy recipients data to current email.
8. Click Send
Dashboard

The Taleo Inbox Dashboard enables a user to take action on talent management tasks from within Microsoft Outlook.

Detailed Description

You can perform the following tasks with the Taleo Inbox Dashboard:

- View and respond to feedback requests
- View, approve, and reject tasks such as employee reviews, development plans, goal plans and succession plans
- Verify if you have tasks that have not been completed
- View your goals and related comments, add comments and update progress
- View, accept, and reject invitations from people who want you to be part of their network in the organization
- View and update development activity progress.
- Access Taleo Performance (via the Employee Center link)

Colors

The user has the ability to change the color schemes for each of the different Widgets contained in the Dashboard. A Right Click on an individual widget displays the Edit Gradient Color option that opens the GradientColorEditor window.

From this window the user can change the Starting Color, the Ending Color, the Gradient direction (Angle), as well as the degree of the angle. The Restore Default option cancels the changes that were made.

The user also has the ability to change the background color of the Dashboard. Collapsing the Widgets makes the background accessible. A Right Click on the background displays the Edit Back Color option that opens the SingleColorEditor window.

From this window the user can change the background color. The Restore Default option cancels the changes that were made.
Expanding or Collapsing Sections in the Dashboard

Prerequisite
You need to be defined as an employee within Taleo Performance.

Outlook > Add-Ins > Dashboard

Steps
Click ⇆ or ⇇ next to the section name to expand or collapse respectively a section.
Accessing Taleo Performance

Prerequisite
You need to be defined as an employee within Taleo Performance.

Outlook > Add-Ins > Dashboard

Steps
Click the Employee Center link.
The system displays the login page for Taleo Performance.

Next Step
Log into Taleo Performance using the appropriate user name and password.
Feedback

Feedback is Taleo Performance-related information that Taleo Inbox users request from other people. The feedback request originates from Taleo Performance and the feedback itself is also part of Taleo Performance.

Benefits

- Taleo Inbox users can request Taleo Performance-related feedback from other people in the organization without opening Taleo Performance.
Sending a Feedback

Allows a user to send feedback to himself/herself or a direct report regarding a goal, an employee review or a competency.

**Prerequisite**

You need to be defined as an employee within Taleo Performance.

*Outlook > Add-Ins > Dashboard*

**Steps**

1. In Microsoft Outlook, ensure that the message you want to provide feedback on is selected.
2. In Microsoft Outlook, click Create Feedback.
3. In the Create a new Feedback window, click next to the About field.
4. Select to whom the feedback will be about: yourself or one of your direct reports.
5. Click OK.
6. In the Create a new Feedback window, click next to the Subject field.
7. Select the type of feedback you want to send.
8. Click OK.
9. In the Create a new Feedback window, type your feedback and, if desired, format the text using the formatting tools provided.
10. Click Copy Email Message if you want to include the e-mail message you selected in your feedback.
11. Click Send Feedback.
Repliesing to a Feedback Request

Prerequisite
You must have a user account in Taleo Performance.

Outlook > Add-Ins > Dashboard

Steps

1. In the Feedback Requests section locate the feedback request and double-click that row or click the corresponding ...

   The window that appears might contain a photo of the employee who is subject of the feedback request. The About field contains the employee's name. The Feedback Items column on the right lists all feedback items that concern the employee and for which your feedback is requested. The Comment field typically contains an explanation of the feedback request.

2. Click Begin Feedback.

3. In the Feedback Items column, click the first item you want to comment on and/or evaluate.

4. Enter your feedback.
   a) You can indicate your rating (from 1 to 5) of the employee's performance for the item by clicking the corresponding star icon.
   b) You can enter a comment in the Comment field and use the formatting tools to format your text.

5. To provide feedback on another item, click the different item in the Feedback Items column.

6. Enter a rating and comment for that feedback item if you wish.
   You will typically want to repeat the previous step and this step until you have provided feedback for all items concerning the candidate.

7. Click Finish and Send.

Result

The request is no longer displayed in the Feedback Requests list. Your comments and/or evaluations of the items become part of the employee's Taleo Performance record. If you provide neither a rating nor a comment for a feedback item, that item is deleted from the system.
Approving/Rejecting Feedback

**Prerequisite**
You need to be defined as an employee within Taleo Performance.

*Outlook > Add-Ins > Dashboard*

**Steps**

1. In the Approvals section, locate the feedback approval request and double-click that row or click the corresponding button.
2. If you require more information regarding the feedback, you can click the Taleo Performance link and log into the product.
3. You can type an explanation of your decision in the box.
4. Click Approve or Reject.
5. Click OK to confirm your decision.
Approving/Rejecting a Goal

Prerequisite

You need to be defined as an employee within Taleo Performance.

Outlook > Add-Ins > Dashboard

Steps

1. In the Approvals section, locate the goal plan and double-click that row or click the corresponding ...
2. You can type an explanation of your decision in the box.
3. Click Approve or Reject.
4. Click OK to confirm your decision.
Approving/Rejecting a Succession Plan

Prerequisite
You need to be defined as an employee within Taleo Performance.

Outlook > Add-Ins > Dashboard

Steps
1. In the Approvals section, locate the succession plan and double-click that row or click the corresponding
   button.
2. You can type an explanation of your decision in the box.
3. Click Approve or Reject.
4. Click OK to confirm your decision.
Approving/Rejecting a Development Plan

**Prerequisite**

You need to be defined as an employee within Taleo Performance.

*Outlook > Add-Ins > Dashboard*

**Steps**

1. In the Approvals section, locate the development plan and double-click that row or click the corresponding ...
2. You can type an explanation of your decision in the box.
3. Click Approve or Reject.
4. Click OK to confirm your decision.
Viewing Task Details

**Prerequisite**
You need to be defined as an employee within Taleo Performance.

*Outlook > Add-Ins > Dashboard*

**Steps**
In the Tasks section, locate the task and double-click that row or click the corresponding ...

**Result**
Taleo Inbox displays information related to the task.
Updating Goal Progress

Prerequisite
You need to be defined as an employee within Taleo Performance.

Outlook > Add-Ins > Dashboard

Steps
1. In the Goals section, locate the goal and double-click that row or click the corresponding.
2. Enter a new value in the Current Value field.
3. Click Update.
4. Click Yes to confirm the change.
5. Click Add if you want to add a comment.
   a) Enter your text in the box.
      You can format your text using the formatting tools if you wish.
6. Click Send.
7. Click Close.
Accepting/Refusing a Network Invitation

Prerequisite
You need to be defined as an employee within Taleo Performance.

Outlook > Add-Ins > Dashboard

Steps
1. In the Network Invitations section, locate the invitation and double-click that row or click the corresponding ...
2. Click Accept or Refuse.
3. Click Yes to confirm your decision.

Result
The invitation is no longer displayed in the Network Invitation section.
Refreshing Taleo Performance Data Displayed in the Dashboard

Prerequisite
You need to be defined as an employee within Taleo Performance.

Outlook > Add-Ins > Dashboard

Steps
Click Refresh located in the top right-hand corner.
Manager Dashboard

The Manager Dashboard provides Taleo Performance managers with extended functionality over the standard Dashboard.

Typically a manager in Taleo Performance is someone who has access to the Manager Center and who is responsible for a number of employees (direct reports). The Manager Dashboard enables such people to perform the following actions in addition to those found in the standard Dashboard (see also Dashboard on page 17):

- Double-click their own name in the left panel to alternately display/hide a list of their direct reports.
- View their direct reports’ goals and related comments, add comments and update the progress rate for each goal.
- View their direct reports’ development activities and related comments, add comments and update the progress rate for each development activity.
- Double-click the name of a direct report to "drill down" to that person’s direct reports and ultimately access associated goals and development activities.

Direct Reports Summary

The Direct Reports Summary is a simple report that can be used by Managers with direct reports to view his/her progress on Goals and Development Activities from within the Dashboard.

This report allows the Manager of his/her Direct reports, to drill down into all users underneath his/her Direct Reports. A director can go into all his managers and if his managers have direct reports he can get details of their goals and Development activities progressions all the way to an employee with no direct reports.
Updating a Direct Report’s Goal Progress

Prerequisite

You need to be defined as an employee within Taleo Performance.

You must have the Manager - Goal Plans (code: PM.Manager.goal) or Manager - Global (code: PM.Manager.all) user type.

Outlook > Add-Ins > Dashboard

Steps

1. If a list of your direct reports is not displayed on the left side of the Manager Dashboard window, double-click your name (displayed on that side of the window).
   The list of your direct reports is displayed below your name. (The following steps apply to your direct reports but to view the list of your direct report's direct reports and perform the same task, double-click the name of your direct report.)

2. Click the name of the direct report on the left side of the Manager Dashboard.
   Your direct report's goals and development activities are displayed on the right side of the window.

3. Locate the goal plan and double-click that row or click the corresponding.

4. Enter a new value in the Current Value field.

5. Click Update.

6. Click Yes to confirm the change.

7. Click Add if you want to add a comment.
   a) Enter your text in the box.
   You can format your text using the formatting tools if you wish.

8. Click Send.

9. Click Close.

Result

The new progression level is displayed in the Progression column and the comment can now be viewed in Taleo Performance.
Updating a Direct Report's Development Activity Progress

Prerequisite
You need to be defined as an employee within Taleo Performance.

You must have the Manager - Development Planning (code: PM.Manager.development) or Manager - Global (code: PM.Manager.all) user type.

Outlook > Add-Ins > Dashboard

Steps
1. If a list of your direct reports is not displayed on the left side of the Manager Dashboard window, double-click your name (displayed on that side of the window).
   The list of your direct reports is displayed below your name. (The following steps apply to your direct reports but to view the list of your direct report's direct reports and perform the same task, double-click the name of your direct report.)
2. Click the name of the direct report on the left side of the Manager Dashboard.
   Your direct report's goals and development activities are displayed on the right side of the window.
3. Locate the development activity and double-click that row or click the corresponding
4. Enter a new value in the Current Value field.
5. Click Update.
6. Click Yes to confirm the change.
7. Click Add if you want to add a comment.
   a) Enter your text in the box.
      You can format your text using the formatting tools if you wish.
8. Click Send.
9. Click Close.

Result
The new progression level is displayed in the Progression column and the comment can now be viewed in Taleo Performance.
Taleo Sidebar

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Taleo Sidebar

Taleo Sidebar is a component that plugs into Microsoft Internet Explorer browser (provided Taleo supports the version of Internet Explorer you use). It enables users to capture candidates directly into Taleo Recruiting without having to quit the active browser window.

**Detailed Description**

Taleo Sidebar provides users the ability to execute tasks such as:

- copy a candidate's resume to the Taleo Sidebar to create a candidate file
- match a candidate to a requisition

**Benefits**

- Enables users to capture candidates directly while browsing job boards or other online resources using Internet Explorer.
- Enables users to copy and paste a candidate's resume displayed on a Web page into Taleo Sidebar.
- Enables users to be productive even when they have not opened a Taleo application.
Configuring Taleo Sidebar

Steps

1. In the Taleo Sidebar window, click Options.
2. In the Language selector, select the language in which you want to use Taleo Sidebar.
3. Click Recruiting Options to specify the following options:
   - Requisition Default Title Field: Specify whether you want to display requisitions with the Recruiter Title or the Manager Title (as defined in the requisition's Logistics section).
   - Candidate Default Language: Default language for the candidates’ resume. The languages in this list are identical to the languages specified in the database. If only one language is enabled in the zone, there is no selection list. The language you select appears automatically in the Candidate Resume Language field when you create a candidate.
   - Candidate Default Country: The country you select appears automatically in the Candidate Information window when you create a candidate.
4. Click Reset Username/Password if you want to reset your user name and password for Taleo Sidebar. The system will request you to enter the new user name and password the next time you use Taleo Inbox. The Reset Username/Password function is common to Taleo Inbox and Taleo Sidebar. Therefore, if you change your user name or password in one of the applications, the new user name and password will have to be used in both applications.
5. Click Change Taleo Hostname if you want to specify a different hostname. You may be asked to enter your user name and password.
6. Click OK.
Displaying the Taleo Sidebar Toolbar for the First Time

Steps

1. Open Internet Explorer.
2. Click View > Explorer Bars > Taleo Sidebar.
3. In the Change Hostname window, enter the Web address you use to connect to the Taleo server.
4. Click Change hostname.
5. In the Taleo First Time Sign In window, if you know your user name and password, click Continue.
   
   If your company uses Single Sign-On, you will need to create a Taleo password before being able to continue.

Result

Taleo Sidebar is displayed on the left side of the Web page. Thereafter, you can display or hide the Taleo Sidebar by repeating steps 1 and 2.
Creating a Candidate

Prerequisite
The following user type permissions must be granted: Create candidates; Access candidate Quick and Specific search.

Steps
1. Access a job board or another online source.
2. Copy the candidate’s resume.
3. Click the text box in Taleo Sidebar and paste the resume in the box.
   You may also load the resume from a local file.
4. In the Candidate Resume Language, click the language of the candidate's resume.
5. Click Next.
6. Enter the candidate's contact information.
   Some fields might be filled automatically with information extracted from the candidate's resume. You can also copy information from the resume and paste it into the appropriate fields. Mandatory fields are indicated by an asterisk.
7. Click Next.
   A duplicate check on the candidate’s e-mail address is performed to see if the candidate already exists in the database. If the email address is found in the database, you will have to log into Taleo Recruiting to verify whether your candidate is in fact already in the system.
8. Perform one of the following steps.
   • If you do not want to verify if the candidate is a good match for any requisitions, click Next (and later Finish).
   • If you want to verify if the candidate is a good match for any requisitions, perform the steps described in "Matching Requisitions to a Candidate".
Matching a Candidate to a Requisition

Prerequisite

You must have a user account in Taleo Recruiting.

The following user type permissions must be granted: Match candidates to requisitions; Create candidates; Access candidate Quick and Specific search.

You have completed the steps in "Creating a Candidate" up to the "Match Requisition" pane.

You must be the owner of the requisition and its status must be Approved or Approved and Posted.

Steps

1. In the Match Requisition pane, type the keywords you want to search for (in requisitions) in the Search Requisition field.
   A search term must have at least 3 characters. Wild card characters are not supported. For example, a search for “eng” (without the quotation marks) will retrieve only requisitions whose content contains the string: eng. Users can search for multiple terms (the AND operator is applied transparently). A search for “technical writer senior” (without the quotation marks) will retrieve only requisitions whose content contains all three words “technical”, “writer” and ”senior” (not necessarily one after the other).

2. You can select All Fields, Requisition Number, Title or Keywords from the drop-down list.

3. Click Search.
   In the Search Results section, the search engine displays all requisitions that meet the search criteria.

4. To match a requisition to the candidate, click the requisition or requisitions in the Search Result list and click Add.

5. Click Next.