Oracle Tap for Talent Management Cloud Service Configuration Guide

Part Number: E54209-01

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Charles Frakes

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Contents

Preface
Revision History ........................................................................................................................................... 2
Technical Configuration and Software Performance ................................................................................. 3
System Requirements for Oracle Tap for Talent Management ................................................................. 4

Oracle Tap for Talent Management Overview
Oracle Tap for Talent Management Overview ...................................................................................... 7
Permissions and Data.................................................................................................................................. 10
Single Sign-On ........................................................................................................................................ 11
Oracle Tap Multilingual Support ............................................................................................................. 12

Oracle Tap for Talent Management Installation
Installation Overview for iPad and iPhone ................................................................................................. 14
Oracle Taleo Enterprise Configuration ....................................................................................................... 14
Mobile Installation ..................................................................................................................................... 17
Installation Overview for Android Devices ................................................................................................. 23

Oracle Tap for Talent Management Configuration
Hiring Manager Worklist Configuration ...................................................................................................... 25
Preface

- Revision History...........................................................................................................2
- Technical Configuration and Software Performance................................................... 3
- System Requirements for Oracle Tap for Talent Management................................. 4
# Revision History

<table>
<thead>
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<th>Modification</th>
<th>Revised Topic</th>
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<tbody>
<tr>
<td>June 17, 2014</td>
<td>Initial version</td>
<td></td>
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</table>
Technical Configuration and Software Performance

For the latest information, refer to the *Taleo Enterprise Technical Configuration and Software Performance Guide* document for the applicable release.
System Requirements for Oracle Tap for Talent Management

System Requirements for Oracle Tap for Talent Management are as follows:

<table>
<thead>
<tr>
<th>Oracle Tap Version for iOS</th>
<th>Device</th>
<th>iOS Operating System Version</th>
<th>Oracle Taleo Enterprise Platform</th>
<th>Certified/Supported/Notes *</th>
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### System Requirements

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<td>HTC One</td>
<td>4.1, 4.2</td>
<td>Feature Pack 13C</td>
<td>Supported</td>
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</tbody>
</table>

* Certified, Supported, and Not Supported

**Certified** - Applies to Browsers/OS versions that are considered mainstream by Taleo. This typically includes current and possibly other recent versions which are likely to be used by a majority of Taleo users. Taleo Development typically uses these environments and full quality assurance (QA) is performed for every feature pack. Customers can file Business Stands and High issues. It is a best practice to use certified browsers.

**Supported** - Applies to previously certified older Browsers/OS versions that are still supported by their vendors and are still used by a significant number of Taleo users. Taleo Development typically has at least one instance of each environment for support purposes and spot quality assurance checks are performed on these versions every feature pack. Customers can file Business Stands and High issues.

**Not Supported** - Applies to previously supported Browsers/OS versions that have been de-supported by their vendors and/or and those never supported or not yet supported by Taleo. While a combination may appear to work, it is not officially supported or certified by Taleo. Taleo will not be able to respond to support incidents entered on non-supported versions.
Oracle Tap for Talent Management
Overview

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Tap for Talent Management Overview</td>
<td>7</td>
</tr>
<tr>
<td>Permissions and Data</td>
<td>10</td>
</tr>
<tr>
<td>Single Sign-On</td>
<td>11</td>
</tr>
<tr>
<td>Oracle Tap Multilingual Support</td>
<td>12</td>
</tr>
</tbody>
</table>
Oracle Tap for Talent Management Overview

Oracle Tap for Talent Management is an application designed for iPad and iPhone, as well as certain Android-based devices. It provides functionalities and features based on the Taleo Enterprise Recruiting and Performance Management applications, on a mobile platform. Oracle Tap for Talent Management allows people to make connections, perform common talent management and talent acquisition activities anytime, anywhere from their mobile device.

Oracle Tap for Talent Management provides:

• Support for Single Sign-On (SSO). SSO is provided for iOS devices in Feature Pack 13B and later; and for Android-based devices in Feature Pack 13C and later.
• Multi-language support. Is provided for iPad and iPhone in Feature Pack 13C and later. For iPad and iPhone versions prior to Feature Pack 13C available in English only. For Android-based devices for Feature Pack 13C and later available in English only.) For details see Oracle Tap Multilingual Support for details.

For iPad and iPhone Devices

Oracle Tap for Talent Management, for the iPad, runs on cloud-based Oracle Taleo Enterprise 13A.4 and later. For the iPhone it runs on Feature Pack 13B and later. Some functionalities for Oracle Tap for Talent Management are available only on the iPad.

Functionalities

These major Oracle Taleo Enterprise functionalities are available on Oracle Tap for Talent Management as mobile applications:

• People
• Requisitions
• Candidates
• Hiring Manager Worklist

Hiring Manager Worklist is only available on iPad with Oracle Taleo Enterprise 13C or later.

Features

Users who have access to Oracle Taleo Performance and Oracle Taleo Recruiting will be able to perform the following actions:

• View People Search and Directory (requires Oracle Taleo Performance for Feedback, Goals and Metrics).
• View Talent Profiles and Provide Feedback (requires Oracle Taleo Performance for Feedback, Goals and Metrics).
• View and Update Goals (available only with Oracle Taleo Performance).
• View and approve Requisitions and Candidates for interviewing (available only with Oracle Taleo Recruiting).
• Complete interview evaluations when candidates are interviewed.
• Review interview evaluation results and progress selected candidates in the next step of the hiring process.
• Take Actions on Candidates (available only with Oracle Taleo Recruiting).
• Review and approve pending hiring offers.
Figure: Tap the More button to display the main navigation menu on the left side.

**For Android-based Devices**

Oracle Tap for Talent Management, for the Nexus 4 smartphone, Nexus 7 tablet and other Android-based devices runs off cloud-based Oracle Taleo Enterprise 13C and later.

**Functionalities**

The major Oracle Taleo Enterprise (TE) functionalities available on Oracle Tap for Talent Management as a mobile Android-based application include:

- **My Team**
- **People**
- **Requisitions**

Users who have access to Oracle Taleo Performance Cloud Service and Oracle Taleo Recruiting Cloud Service will be able to perform the following actions:

- View People, Browse the Talent Directory (requires Oracle Taleo Performance for Feedback, Goals and Metrics).
- View Talent Profiles and Provide Feedback (requires Oracle Taleo Performance for Feedback, Goals and Metrics).
- View and Update Goal Progress (available only with Oracle Taleo Performance).
- Browse Requisitions, and candidate submissions associated with requisitions.
- Disposition candidates.

The ability to view and perform actions is dependent on user permissions.

**Features**

Features are nearly identical to those provided for the iPhone and iPad applications in Oracle TE 13A and 13B. Key differences on the Android-based devices are:

- No talent timeline display is available on candidate submissions. Instead the display is a text listing of all the candidate's past work history and education.
- No talent timeline display is available on talent profiles for Android devices.
- No Organization Spinner capability is available.
- No Search capability is available in this initial release for Android-based devices.
- No Hiring Manager Worklist capability is available for Android-based devices (it is available on iPad 2+ with Release 13C only).
- The "shuttle menu" functionality used in the iPad and iPhone versions is replaced in the Android-based versions by the Actions > Springboard button.

**Example: Springboard Menu, Requisition List and Candidate List**
Tap the Springboard button at bottom right to display the Springboard menu on the upper left.

Figure: Springboard button and menu.

Tap Requisitions in the Springboard menu to open the Requisitions list. Tap a requisition to open the Candidates list for the requisition.

Figure: Requisitions and Candidates pages.
Permissions and Data

Oracle Tap for Talent Management provides a personalized experience for users. The side menu helps users view and navigate through the application. Additionally, Oracle Tap gives users the ability to create and configure a dashboard. Users can have an overview of their key talent management and talent acquisition activities.

Oracle Tap for Taleo is driven by user permissions and data populated in the Oracle Taleo Enterprise system. The user’s ability to view information and perform actions in the Search, Navigation Menu and Dashboard (e.g. search for requisitions, search for people, access Requisitions/People, etc.) is driven by the user permissions configured for them in the Oracle Taleo Enterprise application.
Single Sign-On

Oracle Tap for Talent Management 13B and later supports Single Sign-On (SSO) for customers using an external identity provider (IDP) to authenticate users. This applies to iOS-based devices in Feature Pack 13B and later; and for Android-based devices in Feature Pack 13C and later.

When SSO with the customer’s IDP is enabled on a Taleo zone, a dedicated configuration is automatically passed to Oracle Tap. This dedicated configuration contains two elements:

- Login URL
- Login Success URL

Oracle Tap users open an embedded browser window and go to the page specified under the Login URL. This page redirects users to the customer’s IDP. The IDP login page is displayed in Oracle Tap. When the login is successful, users access the Login Success URL page. The embedded browser window is automatically closed and users can now use Oracle Tap.

When SSO is enabled, it is recommended to turn off the Legal Agreement page in Oracle Taleo Enterprise because it is displayed in the Oracle Tap embedded browser before the IDP login screen.
Oracle Tap Multilingual Support

Oracle Tap for Talent Management now offers multilingual support for iPad and iPhone versions on Feature Pack 13C and later. Users will be able to read labels in the language configured on certified devices.

Oracle Tap for Talent Management supports a total of 16 languages as of Feature Pack 13C:

- Chinese - Simplified
- Chinese - Traditional
- Dutch
- English - U.S.
- English - U.K.
- French - Canada
- French - France
- German
- Italian
- Japanese
- Korean
- Polish
- Portuguese - Brazil
- Russian
- Spanish - New World
- Swedish

A discrepancy may occur between the language of the device and the supported languages on the TE zone. If the language selected on the device is not supported on the TE zone, a locale negotiation process will pick the best matching locale from the ones supported on the zone. User will then experience Tap client with the negotiated locale.

With Oracle Tap for Talent Management 13C there is a limitation with respect to multi-lingual content fields (e.g. Requisition Title). Multi-lingual content fields are not able to leverage Oracle TE's local fallback mechanism to present data in another language, if data in the requested language is not present. As of Oracle TE 14A the fallback language behavior is available on iPad or iPhone devices. Users accessing Oracle Tap for Talent Management 14A or later through the iPad or iPhone are able to view data in multilingual content fields in a zone’s base language, if content from the requested language (iPad/iPhone setting) is not present.

Oracle Tap for Talent Management on Android-based devices in Feature Pack 13C or later is available with English language capability only.
Oracle Tap for Talent Management
Installation

• Installation Overview for iPad and iPhone............................................................. 14
• Installation Overview for Android Devices......................................................... 23
Installation Overview for iPad and iPhone

The following outlines the initial Oracle Taleo Enterprise and mobile application configuration for customers using Oracle Tap for Talent Management on an iPad or iPhone.

The steps to configure Oracle Taleo Enterprise and the mobile application are as follows.

**Oracle Taleo Enterprise Configuration**

1. Administrator activates the Enable Mobile setting.
2. Administrator creates a new User Type and enables the Mobile Access permission.
3. Administrator associates users who will be using the mobile application to the new mobile User Type.
4. Administrator configures the Enable Data Cache setting.
5. Administrator sends out an email to the participants.

**Mobile Application Installation**

1. User navigates to the mobile site.
2. User downloads Oracle Tap from the Apple Application store.
   
   It is recommended you download the latest Tap client from the Apple AppStore in order to ensure you have the latest bug fixes and features.
   
   3. User configures the mobile application with the Oracle Taleo Enterprise product URL and logs in.
4. User launches the mobile application.

Details on the above steps are provided in the following sections of this chapter.

**Oracle Taleo Enterprise Configuration**

The steps to configure Oracle Taleo Enterprise are as follows.

**Administrator Activates the Enable Mobile Setting**

The Enable Mobile setting in the Oracle Taleo Enterprise configuration turns on the mobile application and Oracle Taleo Enterprise integration. When the setting is off the Oracle Taleo Enterprise product(s) will not send data to the mobile application under any circumstance. When the setting is turned on, users that have the Mobile Access permission will have data passed to the mobile application.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Default Value at Upgrade</th>
<th>Default Value for New Zone</th>
<th>State (Public, Protected, Private)</th>
<th>Behavior for Each Value</th>
<th>Location</th>
</tr>
</thead>
</table>
| Enable Mobile   | No                       | No                         | Public                            | • No - Mobile permission is turned off. Users cannot access Taleo via Tap on their mobile device.  
  • Yes - Mobile permission is turned on. Users can access Taleo via Tap on their mobile device. | Configuration > [General Configuration] > Settings > [Refine By] > Category > Mobile |

1. In the Refine by drop-down list, select Category, then Mobile.
2. Click the Enable Mobile setting.
3. Click Edit.
4. Select the Value option.
5. Click Save.

There are additional mobile settings configurable from this list: Enable Data Cache, Retain Previous Login.

Administrator Creates a New User Type and Enables the Mobile Access Permission

There may be some users within an organization the Administrator wants to ensure do not have access to mobile. In this case, the Administrator should create (or duplicate) a new User Type for users who they wish to grant mobile permissions. This action is recommended to control the users who have access to mobile.

<table>
<thead>
<tr>
<th>Permission</th>
<th>Default Value at Upgrade</th>
<th>Default Value for New Zone</th>
<th>State (Public, Protected, Private)</th>
<th>Behavior for Each Value</th>
<th>Location</th>
</tr>
</thead>
</table>
| Mobile Access | No | No | Public | • No - User Type does not have permission to access Taleo using Tap on their mobile device.  
• Yes - User Type has permission to access Taleo using Tap on their mobile device. | Configuration > [SmartOrg] Administration > [Users] User Types > Functional Domains: Mobile > Edit next to General. |


![Permissions Editor - Mobile - General](image_url)

Figure: Permissions Editor - Mobile - General page.

Alternatively, if there is already an existing User Type, the Administrator can modify the existing permissions and enable the Access Mobile permission for users who are already associated with this user type.
Administrator Associates Users Who Will be Using the Mobile Application to the New Mobile User Type

The Administrator associates users who will be using the Mobile application to the new mobile User Type.

1. In the User Accounts page, search for and select a user for whom mobile should be enabled.
2. Click Edit next to User Types.
3. Click Add.
4. In the User Type Selector page, select the User Type for which Mobile Access was enabled and click Select.
5. From the User Account Editor page, confirm that the User Type for which the Access Mobile permission was enabled is associated with the user and click Save.

Administrator Configures the Enable Data Cache Setting

The Enable Data Cache setting in the Oracle Taleo Enterprise configuration allows the Administrator to turn on or off data caching for mobile devices. The default value is Yes (On). When the setting is set to No, the mobile application will only present data when it is online. If the User switches applications, lets the screen go to sleep, taps the power button, turns it off, switches to General Settings, answers the phone, sends a text or email (outside of Tap), or does anything that makes the mobile application not the frontmost visible application on the screen, then all of the data on the disk is instantly purged. When the User switches back to the mobile application again, the application will need to download data from the Oracle Taleo Enterprise application again.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Data Cache</td>
<td>Configuration &gt; [General Configuration] Settings</td>
</tr>
</tbody>
</table>

1. In the Refine by drop-down list, select Category, then Mobile.
2. Click the Enable Data Cache setting.
3. Click Edit.
4. Select the Yes option.
5. Click Save.
Administrator Sends An Email to the Participants

The Administrator sends an email to the users who will be using the mobile application, letting them know that they can access the mobile site, and that the URL will be: "your organization’s zone name/mobile".

Mobile Installation

The steps to install the Oracle Tap for Talent Management mobile application are as follows.

User Navigates to the Mobile Site

1. Using an iPad or an iPhone, navigate to the URL available in the message sent by your Administrator (i.e. "your zone name/mobile", where "your zone name" is the Taleo zone). If you have mobile permissions, you will be redirected to the Mobile screen with instructions on how to configure the iPad or iPhone application. You will be presented with two links:
   - Download the mobile application
   - Configure the mobile application

   Figure: Mobile screen.

2. Tap the first link, "Download the mobile application", to be redirected to the Apple Application store. The Oracle Tap screen opens.

User Downloads Oracle Tap from the Apple Application Store

1. Download Oracle Tap.
It is recommended you download the latest Tap client from the Apple AppStore to in order to ensure you have the latest bug fixes and features.

User Configures the Mobile Application with the Oracle Taleo Enterprise Product URL and Log In Tile

1. Once Oracle Tap is downloaded and installed on the iPad or iPhone, return to the Mobile screen and tap the second link, "Configure the mobile application".

2. The Oracle Taleo Enterprise server URL is injected into the server settings in Oracle Tap.

3. You are redirected to the Apple Application store to download your mobile application.
4. Tap Confirm at the Cloud Configuration confirmation screen.
6. The system auto configures your Tap application to point to your company's Oracle Taleo Enterprise zone.
7. The Talent Management tile is placed on the iPad or iPhone screen.
Alternative Manual Method for User to Configure the Mobile Application with Product URL and Log In Tile

The following steps provide an alternative manual method for the user to configure Oracle Tap for Talent Management (for the iPad or iPhone) to connect with their Taleo zone:

1. Once you have completed downloading Oracle Tap (see above), return to the Oracle Cloud screen on your mobile device.
2. Tap the "Tap to Add Account" tile to start the configuration process.

3. Under "Account Name" specify the name you would like to call your account.

4. Under "Server URL" enter "https://yourtargetzone/smartorg/tap", where "yourtargetzone" is the Taleo zone to which you are connecting.

5. Tap "Proceed to Login" to be taken to the login screen.

**User launches the mobile application**

1. To access Oracle Tap for Talent Management during installation, when prompted tap the Proceed to Login link or the Talent Management tile on the Oracle Cloud screen. During normal usage tap the Talent Management tile.

2. The Oracle Cloud Apps login screen opens.
3. Enter your Oracle Taleo Enterprise Username and Password, and tap Login to start using Oracle Tap for Talent Management on your iPad or iPhone.

Upon initial installation login you may be required to log in twice. When first entering the user name and password, another pop-up may display. If it does, enter your Username and Password again to get authenticated in the Taleo Enterprise zone.
Installation Overview for Android Devices

The following outlines the initial Oracle Taleo Enterprise and mobile application configuration for customers using Oracle Tap for Talent Management on certified Android devices.

The steps to install Oracle Tap for Talent Management and configure the Taleo Enterprise application are as follows.

**Installation**

During installation it is recommended you download the latest Tap client from either the Google Play or Apple AppStore, as is applicable, to ensure you have the latest bug fixes and features.

To install Oracle Tap for Taleo on supported Android-base devices:

2. Once you download Oracle Tap navigate to the URL https://yourzone.taleo.net/mobile (replace "yourzone" with your Taleo zone name). Click the second link on the page,"Configure the mobile application”.
3. When the application launches enter your Oracle Taleo Enterprise (TE) username and password.

![Login Screen](image)

Figure: Login Screen. Enter your Taleo login credentials here.

**Configuration**

As is the case for the iPad/iPhone version, some configuration of the TE system is required for the Android-based version, including the following:

1. Enable Mobile setting.
2. Enable Mobile Access user type permission.
3. Associate Mobile Access user type permission with desired users for mobile access.
4. Enable Data Cache and related General settings.
Oracle Tap for Talent Management Configuration

• Hiring Manager Worklist Configuration..............................................................25
Hiring Manager Worklist Configuration

Certain Hiring Manager Worklist functions in Oracle Tap for Talent Management integrate with the Candidate Selection Workflow (CSW) in Oracle Taleo Recruiting Cloud Service. Some configuration in Recruiting Administration is required of the System Administrator to associate these Worklist functions with specific steps and statuses in the CSW.

The Hiring Manager Worklist feature in Oracle Tap for Talent Management enables hiring managers to perform several managerial tasks associated with talent acquisition from their iPad:

1. Approve requisitions.
2. Review and progress candidates for interviews.
3. Complete evaluation questionnaires and ratings.
4. Review candidates' interview performance and progress candidates for selection.
5. Review selected candidates and approve offers.

Of these, Candidate Review and Candidate Selection (items 2 and 4) are functions which integrate with the CSW and require some configuration.

Candidate Review Configuration

The CSW must be configured to allow candidates that are in the Candidate Review status to be displayed under the Candidate Review section in Hiring Manager Worklist.

An example configuration for the Candidate Review function is as follows.

1. Log into Oracle Taleo Enterprise Configuration.

Figure: Notifications/Worklist menu in Oracle Tap for Talent Management.

An example configuration for the Candidate Review function is as follows.
1. Log into Oracle Taleo Enterprise Configuration.
3. Locate and select a specific hiring manager-related CSW you want to integrate with the Candidate Review function (e.g. Executive) in Worklist. You may need to repeat the following steps if you intend to enable multiple CSW's for mobile. The Steps Usage tab opens.

![Figure: Workflows tab.](image)

<table>
<thead>
<tr>
<th>Code</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>EXECUTIVE</td>
<td>Executive</td>
</tr>
<tr>
<td>EXECUTIVE (AGENCY)</td>
<td>Executive (Agency)</td>
</tr>
<tr>
<td>PR-Simplified</td>
<td>PR-Simplified</td>
</tr>
<tr>
<td>HEALTHCARE DC</td>
<td>Healthcare Workflow - DC</td>
</tr>
<tr>
<td>Hourly - RV</td>
<td>Hourly (One-Step) - RV</td>
</tr>
<tr>
<td>HRLY WRKFLW_BCKGRND</td>
<td>Hourly (Multi-Step)</td>
</tr>
<tr>
<td>INTERNAL</td>
<td>Internal</td>
</tr>
</tbody>
</table>

![Figure: Steps Usage tab.](image)

<table>
<thead>
<tr>
<th>Code</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>WRITE A</td>
</tr>
<tr>
<td>2</td>
<td>PRESCREEN - 2</td>
</tr>
<tr>
<td>3</td>
<td>PHONE SCREEN - 2</td>
</tr>
<tr>
<td>4</td>
<td>HR INTERVIEW - 1</td>
</tr>
<tr>
<td>5</td>
<td>TEST - 2</td>
</tr>
<tr>
<td>10</td>
<td>PRESCREEN</td>
</tr>
<tr>
<td>11</td>
<td>HR INTERVIEW</td>
</tr>
<tr>
<td>12</td>
<td>MANAGEMENT INTERVIEW</td>
</tr>
<tr>
<td>13</td>
<td>VERBAL OFFER</td>
</tr>
<tr>
<td>14</td>
<td>REFERENCE CHECK - 1</td>
</tr>
<tr>
<td>15</td>
<td>WRITTEN OFFER</td>
</tr>
<tr>
<td>16</td>
<td>BACKGROUND CHECK - 2</td>
</tr>
<tr>
<td>17</td>
<td>IMMIGRATION</td>
</tr>
<tr>
<td>18</td>
<td>MEDICAL CHECK</td>
</tr>
<tr>
<td>19</td>
<td>HIRE</td>
</tr>
</tbody>
</table>

4. Select the Steps Usage within the workflow you want to associate with the Candidate Review function (e.g. Hiring Manager Review). Note this name, you will need it in the next step.

5. Switch to the Steps tab.
6. Locate and select the Step you want to associate with the Candidate Review function (the step you noted previously, e.g. Hiring Manager Review). The Statuses Usage tab opens.

7. Locate and select the Statuses Usage (e.g. Forwarded to HM) you want to associate with the Candidate Review function. The Status Details page opens.
8. In "Include Status in Submission Filter (Mobile Only)", select the To be Reviewed option. This associates the Step and Status with the Candidate Review function.

Candidate Selection Configuration

The CSW must be configured to allow candidates that are in the Candidate Selection status to be displayed under the Candidate Selection section in Hiring Manager Worklist.
An example configuration for the Candidate Selection function is as follows.

1. Log into Oracle Taleo Enterprise Configuration


   ![Fig 2: Workflows tab](image)

   **Figure: Workflows tab.**

   3. Locate and select a specific hiring manager-related CSW you want to integrate with the Candidate Selection function (e.g. Executive) in Worklist. You may need to repeat the following steps if you intend to enable multiple CSWs for mobile. The Steps Usage tab opens.
4. Select the Steps Usage within the workflow you want to associate with the Candidate Selection function (e.g. Management Interview). Note this name, you will need it in the next step.

5. Switch to the Steps tab.

6. Locate and select the Step you want to associate with the Candidate Review function (e.g. Management Interview). The Statuses Usage tab opens.
Figure: Statuses Usage tab.
7. Locate and select the Statuses Usage (e.g. Successful) you want to associate with the Candidate Selection function. The Status Details page opens.

![Status Details page](image)

Figure: Status Details page.

8. In "Include Status in Submission Filter (Mobile Only)", select the Waiting for Decision option. This associates the Step and Status with the Candidate Selection function.

**Configuration**

The Candidate Review and Candidate Selection functions in the Hiring Manager Worklist support the Candidate Selection Workflow (CSW) in Recruiting. Some configuration in Recruiting Administration is required is required of the System Administrator to associate these Worklist functions with specific steps and statuses in the CSW.
### Configuration Setting

<table>
<thead>
<tr>
<th>Name</th>
<th>Location</th>
<th>Description</th>
</tr>
</thead>
</table>
| Workflows             | **Configuration > [Recruiting Administration] > [Process] Candidate Selection Workflow** | • Use to define Candidate Selection Workflows; including steps, statuses and actions a hiring manager must go through before hiring a candidate.  
• The "Include Status in Submission Filter (Mobile Only)" section on the Status Details page specifically facilitates this configuration. |

### Impacts

#### Mandatory/Optional

- The Worklist feature is mandatory. If Oracle Tap for Talent Management 13C or later is installed, the user inherits it on their iPad.

#### Enabled/Disabled

- Worklist is enabled by default when Oracle Tap for Talent Management 13C or later is installed.

#### Migration

- Worklist is only available with Oracle Talent Management 13C or later.
- Worklist is only available on the iPad.
- Some Recruiting Administration configuration is required, as discussed above.