

Oracle Talent Acquisition Cloud

Using Fluid Recruiting

17 (update 17.8)

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Preface

This preface introduces information sources that can help you use the application and this guide.

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1 Overview

Fluid Recruiting Overview

Fluid Recruiting is an HTML recruiting solution that helps enterprises assess and hire the best talent.

Fluid Recruiting offers a simple and modern user interface usable on desktop, laptop, tablet, and smartphone. Fluid Recruiting works on the Oracle Talent Acquisition Cloud platform, capitalizing on the same user accounts, user types, user permissions, settings, and other configuration. Fluid Recruiting leverages concepts, icons, data and behavior similar to the Recruiting Center while providing an improved user experience.

Users can use Fluid Recruiting in parallel with the existing Recruiting Center. They can process requisitions and candidates in Fluid Recruiting. If they need to take further actions, they can return to the Recruiting Center to complete the tasks.

The following capabilities are provided with the initial release:

- Viewing the requisition list. The following requisition types are supported: Executive, Professional, Campus, Hourly, Contingent.
- Viewing requisition details, including requisition info and attachments.
- Creating, editing, duplicating requisitions.
- Viewing a requisition's submission list.
- Viewing candidate submission details, including job submission info, attachments, and history.
- Sending correspondence.
- Adding comments.
- Changing a submission step and status.
- Performing a quick search to find submissions.
- Performing bulk actions (send correspondence, add comments, change submission step and status)

Language Support

Fluid Recruiting supports the same set of languages as the Recruiting Center. All languages activated in the Recruiting Center are reflected in the Fluid Recruiting.

Mobile Support

Fluid Recruiting is supported on a variety of devices. Whether a desktop or smartphone is used, the UI will adjust to render the optimal experience on the device.

For example, viewing and navigating into submission details has been optimized on the smartphone. Instead of displaying all of the submission details (which can result in a lot of scrolling on a phone's small screen), the view initially opens on the

submission's summary card and users can flip to view other submissions while always viewing this same level of detail. If necessary, users can click to see the complete submission details. The same applies to the requisition details.

Because of the limited space on smartphones, the information is displayed differently than on a desktop. For example, on smartphones and portrait mode of tablets, the columns displayed in requisitions and submissions lists are limited and lists cannot be sorted. Also, submission disposition actions are only available in the details page (and not on the list page).

Permissions and Access

Users have access to different Oracle Talent Acquisition Cloud (OTAC) products according to their user permissions.

To access Fluid Recruiting, the following user type permission is required. This permission is available under SmartOrg Administration > User Types > Recruiting > Other > General.

- Access Fluid Recruiting

Once the permission is granted, Fluid Recruiting appears in the Quick Access links section of the Welcome Center.

2 Requisition Management

Viewing Requisition List

The requisition list allows you to quickly and effectively view and find requisitions.

From the requisition list, you can:

- View the list of open requisitions based on requisition ownership.
- View all requisitions including those in inactive statuses such as Draft, Deleted, and Cancelled.
- Navigate through the paginated requisition list.
- View detailed requisition content.
- Access the list of candidate submissions for a requisition.
- Filter requisitions using various criteria. Once you have selected criteria, you can click Apply Filters to refresh the list accordingly, or click Clear All to clear the selected filters. Applied filters are shown in the top of the list and you can click the x icon next to each filter to remove the filter.
- Sort requisitions using the available columns.
- When you hover over the requisition title, a pop up window appears and provides requisition details such as the hiring manager, the recruiter, the primary location, hired candidates, activated languages.

Viewing Requisition Details

When you view a requisition, the details of the requisition are presented in the following two tabs:

- Requisition Info: Contains all the information for the job organized into different sections that you can expand and collapse depending on their pertinence.
- Attachments: Contains files attached to the requisition. You can preview and download attachments.

You can navigate back to the requisition list using the Back to Requisition List button. You are returned to the requisition list and the most recent requisition you were viewing is highlighted.

You can also flip through the requisition details for each of the requisitions displayed on your list by clicking the previous and next buttons.

Requisition Summary Card

When you view a requisition, a summary of the requisition is displayed on the requisition card. The summary highlights important details from the requisition such as links to pre-filtered submissions (active and new), requisition status, structure, hiring team.

Creating Requisitions

You create requisitions to detail the specific requirements of a job for which somebody must be hired.

You create a requisition using the Create Requisition button. You specify the hire type for the requisition, you select a template, and you specify attributes such as organization, location, job field. Once this is done, you complete fields in the requisition form.

Editing Requisitions

When you view a requisition, you can click the Edit All link or the pencil icon to modify the value of fields and user-defined fields.

Fields in these sections can be modified:

- Structure: This section contains fields such as primary location, organization, job field.
- Administration: This section contains fields such as candidate selection workflow, regulations, budget, compensation, contingent terms. You cannot edit the Pay Basis field.
- Logistics: This section contains fields such as requisition ID, requisition title, number of openings, user group, owners, collaborators.

Duplicating Requisitions

You duplicate requisitions to create requisitions similar to an existing one.

When you view a requisition, use the Duplicate this requisition action to create a similar requisition. A requisition can be duplicated regardless of its status. When duplicating a requisition, all of the information is duplicated.

Adding Comments

Use the Add Comment action in the requisition or requisition list to add a comment to the requisition.

3 Candidate Submission Management

Viewing Submission List

When you view the requisitions list, click the candidate count next to the requisition to directly navigate to the list of submissions for that requisition.

From the submission list, you can:

- View the list of submissions for the requisition and see their progress in the selection process.
- Navigate through the paginated candidate submission list.
- Open a candidate submission to view its content.
- Filter candidate submissions using various criteria. Once you have selected criteria, you can click Apply Candidate Filters to refresh the list, or click Clear All to clear the selected filters. Applied filters are shown in the top of the list and you can click the x icon next to each filter to remove the filter.
- See how many candidate submissions are currently in the various steps and statuses of the selection process.
- Sort candidate submissions.
- Perform actions directly from the list. You select a candidate submission by clicking and highlighting the row and you then select the action from the action toolbar. You can also use the Actions dropdown that is displayed directly on each submission's row.
- Perform bulk actions. The following actions can be performed on several submissions at a time: Change Step/ Status, Send Correspondence, Add Comments.
- Select a list format to display candidate submissions.

When you are viewing a requisition, you can get to three different pre-filtered submission lists: New Candidates (candidates who are in the step New), Active Candidates, All Candidates (including rejected, declined, and hired).

When you hover over a candidate name, a pop up appears and provides candidate details such as contact phone, contact email, candidate ID.

Viewing Candidate Submission Details

When you view a candidate submission, the details of the submission are presented in the following tabs:

- Job Submission: Contains all the details of the candidate submission organized into different sections that you can expand and collapse depending on their pertinence.
- Attachments: Attachments are organized into three sections. The first section contains the resumes attached to the submission. The second section contains other attachments relevant to the submission. The last section contains attachments that are either relevant to other submissions or to the candidate's general profile. You can preview and download the contents of an attachment.
- Offers: This tab is displayed once an offer is created. It contains details about the current offer. You can display previous offers, if any, and highlight the differences between the offers. You can view the offer letter as well as files attached to the offer. The offer grid can be displayed in full screen size or normal size.

- History: Presents useful tracking details on actions performed on the submission.

You can navigate to the requisition details from a submission by clicking the requisition name. You can also get a quick preview of the requisition details without navigating away from the current screen by clicking the preview icon next to the requisition name.

You can navigate back to the submission list using the Back to Submission List button. You are returned to the submission list and the most recent requisition you viewed is highlighted.

You can flip through the submission details for each of the submissions displayed on your list by clicking the previous and next buttons.

You can perform actions by selecting actions in the More Actions menu or in the action toolbar.

Submission Summary Card

When you view a candidate submission, a summary of the job submission is displayed on the submission card. The summary highlights important details about the submission such as candidate identification, work experience, education, prescreening results, submission status.

If a resume is attached to the submission, you can click the Resume button to view the resume. While viewing the resume, you can navigate through the resume if it contains several pages, you can flip through the other candidate submissions and see their resumes, and you have direct access to the action toolbar from where you can disposition the candidate. When you close the resume preview, you are right back to where you were previously.

Selecting a Submission List Format

List formats allow the display of candidate submission information using different columns.

Your administrator creates list formats that suit the needs of your organization and make them available. You can select the list format you wish to use to display submission information.

Searching for Candidate Submissions

The submission search allows users to quickly find specific candidate submissions.

When you perform a submission search, the search engine searches for candidates who applied on a job or who submitted a profile. The search engine searches information in the following fields:

- first name
- last name
- middle name
- email address
- username
- candidate ID

When you perform a submission search, you can enter partial names (either the first or last name with the * wildcard) or complete names in the field. A best practice is to enter complete names to obtain better results. You can also search with a middle initial if you know the person's full name (example: Sam P Jones). If you search for someone who's first name contains initials, enter just the initials (example: Jr. will give you the following results: Jr., j.r., or JR). If you are looking for someone who hyphenates his/her name, you don't have to enter both names. Let's say Smith-Jones is the name you are looking for. Entering Smith, Jones, Smith space Jones or Smith-Jones, will bring back Smith-Jones.

4 Candidate Submission Actions

Sending Correspondence to a Candidate

Use the Send Correspondence action in the candidate submission or submission list to create a message and send it to the candidate.

You can send a correspondence to one candidate or several candidates (bulk action).

You can select how the message is sent. Two options are available:

- email
- printed letter

You can use a message template to create a message or create the message from scratch.

Write Message From a Template

The list of templates that you can use is displayed. Use filters to find the desired template. You can see a preview of the message before selecting it. If you are granted the permission, you can edit the message.

Write Message From Scratch

You can create a message from scratch using the text editor. Before sending the message, you can see a preview of the message and make final edits if needed.

Changing Submission Step and Status

Use the Change Step/Status action in the candidate submission or submission list to change the step and status of a candidate submission.

You can change the step/status for one candidate submission or several candidate submissions (bulk action).

Available step and status selections are based on the requisition's candidate selection process configuration and on your user permissions.

Use the Change Step/Status action in the candidate submission or submissions list, select the desired step and status, and enter comments. If configured, you may be required to enter disposition details about the change you are making.

Adding Generic Comments

Use the Add Comment action in the candidate submission or submission list to add a comment to the submission.

You can add comments in one candidate submission or several candidate submissions (bulk action).

Viewing Submission History – Read Only

Click the History tab in the candidate submission to view the submission history.

From the History tab, you can:

- View the list of submission history entries listed with recent events at the top.
- For each history event you can view the date, event name, details plus comments and the user who performed the event.