Talent Acquisition Cloud
Using Fluid Recruiting

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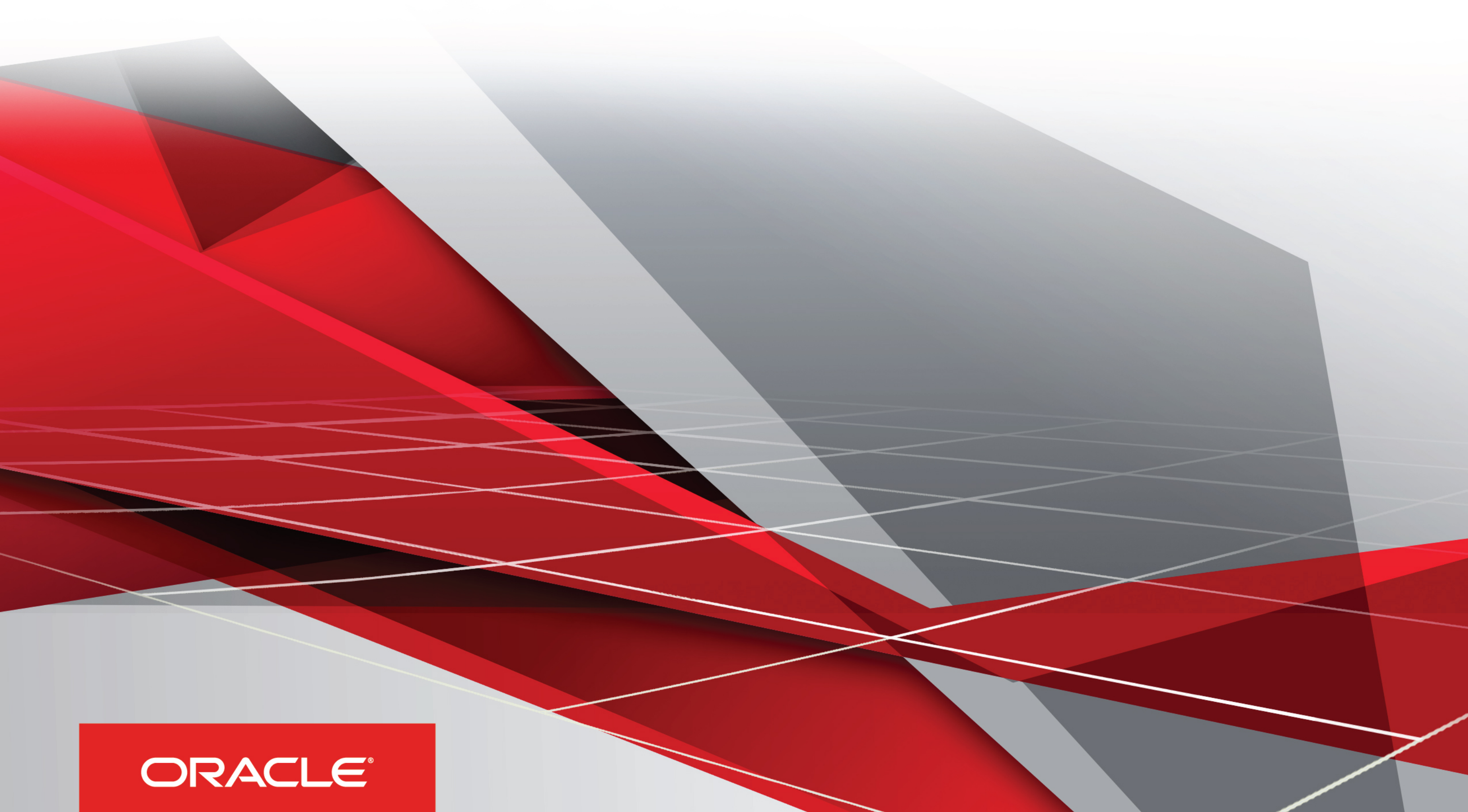

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Authors: OTAC Information Development Team

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Contents

Preface i

1 Overview 1

Overview of Fluid Recruiting 1
Language Support 1
Mobile Support 1
Permissions and Access 1

2 Requisition Management 3

Requisition List 3
Requisition Details 3
Create Requisitions 4
Submit Requisitions for Approval 4
Post Requisitions 4
Duplicate Requisitions 5
Set the ACE Alert 5
Set the Request More Information Alert 6
Add Collaborators to Requisitions 6
Add Comments 6
Use Attachments in Requisitions 7

3 Candidate Profile 9

Candidate Profile 9
Use Attachments in Candidate Profiles 9

4 Candidate Submission Management 11

Submission List 11
Candidate Submission Details 11
Submission List Format 12
Create Candidate Submissions 12

Search for Candidate Submissions 13
Send Correspondence to a Candidate 13
Change Submission Step and Status 14
Add Comments 14
View Candidate Submission History 14

5 Offer Management 15

Create Offers 15
Submit Offers for Approval 15
Extend Offers 15
Send Offers 16

6 Evaluation Management 17

Evaluation Management 17

Preface

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

Using Oracle Applications

To find guides for Oracle Applications, go to the Oracle Help Center at *http://docs.oracle.com/*.

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1 Overview

Overview of Fluid Recruiting

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.

For a list of available features, see article Fluid Recruiting Feature Availability (ID 2491009.1) on My Oracle Support.

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

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 Canceled.
- Navigate through the paginated requisition list.
- Filter requisitions using various criteria. Once you have selected criteria, 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. Click the **x** icon next to each filter to remove the filter.
- Sort requisitions using the available columns.
- Hover your mouse over the requisition title to get requisition info such as the hiring manager, recruiter, primary location, hired candidates, activated languages.
- Click the title of a requisition to view detailed requisition content.
- Click the candidate count of a requisition to access the list of active candidate submissions for that requisition.
- Perform actions available in the More Actions menu.
- Create requisitions.

Requisition Details

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

- Requisition Info: Contains all the info for the job organized into different sections that you can expand and collapse depending on their pertinence. You can modify the info.
- Prescreen Alerts: This is where you can set an ACE alert and a Request More Information (RMI) alert.
- Attachments: Contains files attached to the requisition. You can view, preview, delete, upload, and download attachments.
- Approvals: Displays the progress of the approval such as the approvers, the decision made, and the date and time of the approval.
- Sourcing: Allows you to post requisitions on external and internal career sections, and job boards.
- Interviews: This is where you can add evaluation questionnaires, send evaluation feedback requests to evaluators to ask them to evaluate candidates, view feedback provided by evaluators.

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 of the requisition such as links to pre-filtered submissions (active and new), requisition status, structure, hiring team, job information. Use the arrow to expand or collapse the summary card.

Create 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 first start by selecting basic information such as the hire type for the requisition, the template you want to use, and attributes such as organization, location, job field. Once you're done, the requisition form is displayed and you complete all the information required in the form.

When you save the requisition, a message appears if you forgot to enter information in certain fields. When you are done completing the requisition, the requisition goes through an approval process before being posted on internal or external career sections.

Submit Requisitions for Approval

When you are creating a requisition and are done entering all the details, you can submit the requisition for approval using the **Submit for Approval** action.

If the dynamic approval routing (DAR) process is used, a predefined list of approvers is displayed. If you have the permissions, you can modify the list of approvers by adding and removing approvers. You can also define the order of approval by assigning a sequence number to each approver.

Once you submit the requisition for approval, the approvers receive an approval request notification in the order set in the approval path. You can see the progress of the approval such as the decision made and the date and time of the approval in the job requisition Approvals tab.

Post Requisitions

When a requisition has been approved, you can post it to career sections and job boards.

Posting to Career Sections

You can post requisitions to internal and external career sites.

1. From the requisition Sourcing tab, click the **Add career sections** button to access the career sections selector. A list of default career sections and their posting schedule is displayed.
2. You can select a default career section or select other career sections.
3. Once you have selected a career section, you can:
    a. Use the default posting schedule or modify it.

   b. Mark the posting as urgent.
   c. Set the **Apply Online** option before posting the requisition.
   d. Add and remove career sections.
   e. Unpost the requisition from a career section.
   f. View the list of career section along with their posting status.

Posting to Job Boards

Job board posting is available for requisitions posted on external career sections.

1. From the requisition Sourcing tab, click the **Select job boards for posting** button.
2. Select the supplier, account, and language.
3. Click **Next**.
4. You are then taken to the supplier's site where you can select job boards and provide more details about the posting.

Duplicate 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.

Set the ACE Alert

The ACE alert allows you to set a threshold to identify the ideal candidates for a job. ACE candidates are identified based on their responses to the competencies and questions in the requisition file.

You set the ACE alert in the requisition Prescreen Alerts tab. The following options are available:

Option	Description
Result: A submission meeting all the prescreening required criteria and obtaining a result of at least n %	Candidates who meet all the required criteria and the result value will be considered ACE candidates.
Asset: A submission meeting all the prescreening required criteria and obtaining n of 3 assets	Candidates who meet all the required criteria and the minimum number of assets will be considered ACE candidates.
Both Result and Assets must be met	This option is used to identify ACE candidates using the result and asset conditions.
Either Result or Assets must be met	This option is used to identify ACE candidates using the result or asset condition.

When you set the ACE alert, you can send an email to specific recipients to inform them that ACE candidates were found. The email contains a PDF of the candidate files. All recipients receive the same candidate files, regardless of their permissions to view candidate information.

Once the ACE alert is set on a requisition, the ACE star icon appears on the Requisitions list, next to a requisition and also on the requisition summary card.

Candidates who apply to the requisition and meet the criteria are marked as ACE candidate on their respective submission. The ACE star icon is displayed.

Set the Request More Information Alert

The Request More Information (RMI) alert allows you to contact candidates who meet prescreening required criteria for a job and to request more information from them. Candidates receive an email inviting them to return to their submission and provide missing information.

You set the RMI alert in the requisition Prescreen Alerts tab. The following options are available:

Option	Description
Result: A submission meeting all the prescreening required criteria and obtaining a result of at least n %	Candidates who meet all the required criteria and the result value will be considered ACE candidates.
Asset: A submission meeting all the prescreening required criteria and obtaining n of x assets	Candidates who meet all the required criteria and the minimum number of assets will be considered ACE candidates.
Both Result and Assets must be met	This option is used to identify ACE candidates using the result and asset conditions.
Either Result or Assets must be met	This option is used to identify ACE candidates using the result or asset condition.

Add Collaborators to Requisitions

A collaborator is a person chosen by the owner of a requisition who helps out or takes responsibility for certain parts of the requisition process.

When you create a requisition, you can add collaborators who would be responsible for selected steps within the requisition or recruitment process. In the Requisition Info tab, click the **Add Collaborators** link. When you add collaborators, you can use the **Frequent Collaborators** option or other filters to find the people you want to add as collaborators. You can add a maximum of 30 collaborators.

Add Comments

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

Use Attachments in Requisitions

You can view, preview, delete, upload, and download attachments in requisitions.

Attachments are available in the requisition Attachments tab. The following file formats are supported. System administrators define which formats are available to users.

- Any File Format
- Excel (.xls and .xlsx)
- Hypertext Markup Language (.htm and .html)
- OpenOffice Writer (.odt)
- Portal Document Format (.pdf)
- Rich Text Format (.rtf)
- Text (.txt)
- Word (.doc and .docx)
- Word Perfect (.wpd)
- Zip Format

Once a file is uploaded, you can preview, delete, and download the file.

3 Candidate Profile

Candidate Profile

A candidate profile contains information such as candidate personal information, work experience, employment preferences.

You can view the general profile of candidates while looking at their job submissions. This provides you with a better and more complete understanding of the candidates. When you view the job submission of a candidate, you can toggle between the general profile and submission of the candidate.

The general profile view is organised into four tabs:

- General Profile: Provides high level information about the candidate such as personal information, work experience, employment preferences. The General Profile tab is available in view mode only. You can't edit the information.
- Attachments: Contains resume and other attachments provided by the candidate and attachments you provided. You can view, preview, edit, download, and delete attachments.
- Referral: Contains referrals provided by candidates, employees, and agents.
- History: Contains a log of all actions performed on the candidate file. You can view the history of the general profile only, the general profile and all submissions, or all active submissions.

General Profile Summary Card

When you view the general profile of a candidate, a summary of the profile is displayed on the profile card. The summary highlights important details about the candidate such as contact information in the information callout, active submissions, most relevant education, work experience.

Use Attachments in Candidate Profiles

You can view, preview, delete, upload, and download attachments in candidate general profiles.

Attachments are available in the Attachments tab. The following file formats are supported. System administrators define which formats are available to users.

- Any File Format
- Excel (.xls and .xlsx)
- Hypertext Markup Language (.htm and .html)
- OpenOffice Writer (.odt)
- Portal Document Format (.pdf)
- Rich Text Format (.rtf)
- Text (.txt)
- Word (.doc and .docx)
- Word Perfect (.wpd)

- Zip Format

When you upload an attachment, you can indicate if the file is a candidate resume or another type of attachment. You can also indicate if the attachment is visible to candidates.

Once a file is uploaded, you can preview, edit, delete, and download the file.

4 Candidate Submission Management

Submission List

You can access the list of all submissions by clicking the **Submissions** tab. You can also navigate directly to the submissions of a specific requisition by clicking the candidate count of the requisition in the requisition list.

From the submission list, you can:

- View the list of submissions and see their progress in the selection process.
- Navigate through the paginated submission list.
- Open a candidate submission to view its content.
- Filter submissions using various criteria. Once you have selected criteria, 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. 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 using the available columns.
- Perform actions directly from the list. Select a candidate submission then select the action from the action toolbar. You can also use the More Actions menu displayed directly on each submission's row.
- Perform bulk actions. Select multiple submissions then perform these actions: Change Step/Status, Send Correspondence, Add Comments.
- Select a list format to display candidate submissions.

When you view 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.

Candidate Submission Details

A candidate submission is a record containing information provided by the candidate when applying for a job. It also contains information about the progression of the candidate submission in the candidate selection process.

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: Displays attachments into different sections. The first section contains the resumes attached to the submission. The second section contains attachments relevant to the submission. The third section contains offer-related attachments. And 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. Click the **Modify Categories** button to select the event categories you want to display.

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.

Use the arrow to expand or collapse the summary card.

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. When you are viewing a list of submission, you can select the list format you wish to use to display submission information.

Create Candidate Submissions

You can create a candidate submission while reviewing the list of submissions for a requisition.

1. Open a requisition.
2. Access the submissions for the requisition.
3. In the More Actions menu, select **Create New Candidate**.
4. Indicate for which requisition you want to create the submission, the current requisition or another requisition.
5. Click **Next**. You are then taken to the creation flow.
6. Select the form you want to use to create the candidate submission.
7. Upload the resume of the candidate. This step is optional.

8. A duplicate check is performed.
    - If duplicate candidates are found, you can overwrite an existing candidate profile or create a new candidate profile. You can upload a resume or enter the submission details manually.
    - If no duplicates are found or if duplicates are found but the candidate is not on the list, you can go back to the previous page and change the information used to find duplicates. Or, you can create a new candidate
9. Complete the fields.

Search for Candidate Submissions

The submission search allows you to quickly find specific candidate submissions and candidate profiles.

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 do 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.

Send 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.

Change 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.

Add 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).

View Candidate Submission History

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.

5 Offer Management

Create Offers

You create job offers to present the terms and conditions of a job offer.

When a candidate reaches the Offer step, you can create an offer using the **Create Offer** action.

The offer form is where all the information is gathered to create an offer. You specify info such as the start date, salary, pay basis, vacation, car allowance. Once you have completed the fields, you save the offer and you can then submit it for approval.

There can only be one current offer per candidate application at a time. The current offer can be modified until it is approved or extended to a candidate, after which only the start date and expiration date can be modified.

Submit Offers for Approval

When you create an offer for a candidate, you can route the offer for approval by selecting the Submit Offer for Approval action. This action is used when at least one person must approve an offer before extending it to the candidate.

1. Open a candidate submission.
2. Click the **Offers** tab.
3. In the More Actions menu, select **Submit Offer for Approval**.
4. Select the approvers.
5. Define the sequence of approval by assigning a sequence number using the drop-down list under the Order column.
6. Indicate if you want to add the approvers to the list of collaborators for the requisition and the list of frequent collaborators.
7. Click **Submit for Approval**.

The system assigns the task to the first approver in the sequence. The approver receives an Approve Offer task.

Extend Offers

Extend offers to candidates verbally, by email, using a printed letter, or using E-offer.

Once the offer for a candidate is approved, you can extend it to the candidate using the**Extend Offer** action. These options are available:

- E-offer:
- Email: When you use the email option, you can review and edit the content of the message before sending it to the candidate. When you are satisfied with the content, you click the **Extend Offer** button to send the offer.
- Printed Letter: When you use the printed letter option, you can review and edit the content of the letter before sending it to the candidate. When you are satisfied with the content, you click the **Print** button to print the offer.

- Verbally: For verbal offers, you enter the date when the offer was extended to the candidate. You then click the **Mark as Extended Verbally** button.

Send Offers

Send offers to candidates by email or printed letter once offers have been extended.

Once an offer is extended to a candidate whether verbally, by email, or using a printed letter, you can use the **Send Offer** action to send the offer to the candidate. You can send the offer by email or printed letter. You can edit the content of the message or letter before sending it. This feature is mostly used when an offer is extended verbally and then mailed to the candidate.

6 Evaluation Management

Evaluation Management

Evaluation Management allows your organization to electronically capture, review, and analyze an evaluator's input obtained during a candidate interview screening process.

Fluid Recruiting is using the existing Evaluation Management functionalities of Taleo Recruiting. From the Interviews tab of a job requisition, you can:

- Add evaluation questionnaires.
- Send evaluation feedback requests to evaluators to ask them to evaluate candidates using evaluation questionnaires.
- View feedback provided by evaluators.