Talent Acquisition Cloud

Using Fluid Recruiting

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F23281-02

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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
Deep Links to Access Specific Pages 2

2 Candidate Search 3

Find Candidates Using Advanced Search 3
Save Your Candidate Search Query 4
Access Your Candidate Search Queries 4
Filter Candidate Search Results 5

3 Requisitions 7

Create a Requisition 7
Submit a Requisition for Approval 7
Approve a Requisition 7
Post a Requisition to a Career Section 8
Post a Requisition to a Job Board 8
Use Staffing Agents to Refer Candidates 8
Invite Candidates to Apply to a Requisition 9
Perform Actions on Requisitions 10
View Tracking Details on a Requisition 11
Add Collaborators to a Requisition 11
Set the ACE Alert to Identify Ideal Candidates 12
Set the Request More Information Alert to Get Info from Candidates 12
Requisition List 13
Requisition Details 13
Understanding the Prescreening Section in the Requisition 14
Use Attachments in a Requisition 15

Manage Pipeline Requisitions 15

4 Candidate Profiles 17

Candidate Profile 17
Create a Candidate Profile 17
Generate a Password for a Candidate 18
Use Attachments in a Candidate Profile 18

5 Candidate Submissions 21

Submission List 21
Candidate Submission Details 21
Search for Candidate Submissions 22
Create a Candidate Submission 23
Merge Candidate Submissions 23
Share a Candidate Submission 23
Change the Step and Status of a Candidate Submission 24
Revert a Candidate Submission Step and Status 24
Send Correspondence to a Candidate 24
Add Comments to a Candidate Submission 25
Use Attachments in a Candidate Submission 25
View Tracking Details on a Candidate Submission 25
Request Screening Services for a Candidate 26
Link Candidates to a Requisition 26
Start a Pre-Hire Onboarding Process 27
Start a New Hire Onboarding Process 27

6 Offers 29

Create an Offer 29
Submit an Offer for Approval 29
Approve an Offer 29
Extend an Offer 30
Send an Offer 30
Capture the Candidate's Response to an Offer 31
Capture the Candidate's Response as Soon as the Offer is Extended 31

7 Evaluations 33

Evaluation Management 33

8 **LinkedIn Recruiter System Connect** **35**
LinkedIn Recruiter System Connect Overview 35
Key Capabilities in LinkedIn Recruiter 35
Key Capabilities in Fluid Recruiting 35

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/*.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program website*.

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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.

Deep Links to Access Specific Pages

Fluid Recruiting supports certain URLs to get access to specific pages. When you receive an email to perform an action, click the link in the email to directly access the page where you can perform the action.

The following URLs provide a direct access to pages:

- Create New Requisition: http://client.taleo.net/enterprise/publicurl/createRequisition
- Requisitions list: http://client.taleo.net/enterprise/publicurl/viewRequisitions
- View a requisition: http://client.taleo.net/enterprise/publicurl/viewRequisition?requisitionNumber=8765
- View a requisition: http://client.taleo.net/enterprise/publicurl/viewRequisition?contestNumber=TOR0000334
- View the submissions list for a requisition: http://client.taleo.net/enterprise/publicurl/viewCandidates?requisitionNumber=8765
- View a candidate profile: http://client.taleo.net/enterprise/publicurl/viewProfile?candidateNumber=5139
- View a candidate submission: http://client.taleo.net/enterprise/publicurl/viewApplication?applicationNumber=35097
- View an offer: http://client.taleo.net/enterprise/publicurl/viewOffer?offerNumber=15066

2 Candidate Search

Find Candidates Using Advanced Search

Use the Find Candidates tool to quickly find specific candidates using advanced filters.

The Find Candidates tool is available on the core navigation bar. When you click **Find Candidates**, the New Search Criteria page appears. This is where you select criteria to find candidates.

> **Note:** Users who have the permission to perform advanced search have access to the Find Candidates feature.

When you use the Find Candidates tool, the more you add search criteria, the narrower the scope of your search will be, typically resulting in fewer but more pertinent results. By adding multiple occurrences of the same criteria, you broaden the scope of your search, typically resulting in more search results.

A best practice is to start your search with only a few criteria, and to narrow your search down by going back to your search query and entering one or more additional search criteria. Your search results will then contain fewer candidates. It's simpler and more efficient to start with a general search and narrow down the results to a manageable candidate pool than to start with a tightly defined narrow search and then need to broaden the search to obtain a viable candidate pool.

Search criteria are organized into different categories or types.

Search Criteria Presets

These are criteria set by your administrator. You can't change them, they're shown only for informational purposes. The presets may affect search results.

Required Criteria

These criteria have a red asterisk beside them. They were added to the search form by your administrator. You can't change them.

Required, Excluded, or Desired Criteria

For many search fields, you can specify one of these criteria:

- Required: Only candidates with that criterion are retrieved.
- Desired: Candidates with that criterion are considered more relevant than those without the criterion.
- Excluded: Candidates with that criterion are excluded.

Customize Search Parameters

If you have the required permission, you can add more criteria to the search form. Click the **Customize Parameters** icon and select the desired criteria. Criteria are added to their respective section automatically.

Default Value

You can select a value for a search criterion and make that value the default value when creating a new search query. Let's say that for the External/Internal Candidates criterion, you want the External value to be the default value. Select External, then click **Make Default**.

Keyword Search

You use the Keyword search when you want to search candidates based on specific terms, related terms, or a block of text in the candidate profile. These keyword search types are available:

- Exact Terms: The search engine returns words that match exactly the terms you entered.
- Related Terms: The search engine searches for occurrences of the word you entered but also searches for occurrences of related terms determined by the system.
- Conceptual: The search engine finds the right concepts to search for based on the text you entered and then broaden its search by searching documents or attachments with relevant ideas and concepts to the text you provided. For example, you could use text from a candidate's resume or job description to search for candidates.

To help you select the proper search type, an information icon provides details about the Related Terms and Conceptual search.

Save Your Candidate Search Query

A search query is a candidate search that you saved because you want to use it frequently or to potentially share it with other recruiters.

1. Click **Find Candidates**.
2. In the New Search Criteria tab, enter values in the search criteria.
3. Click the **Customize Parameters** icon to add more search criteria.
4. Click **Save**.
5. In the Save Search Criteria window, enter a name for your search.
6. Select a folder to save your search. Personal search queries are only available to you. Shared queries are available to other recruiters.
7. Click **Done**.

Access Your Candidate Search Queries

Save your candidate search queries and use the Saved Searches tool to quickly access saved candidate searches.

1. Click **Find Candidates**.
2. Click the **Saved Searches** tab.
3. Use the Folder menu to display personal searches, shared searches, or both.

Filter Candidate Search Results

Use filters to narrow down the list of candidates found after performing a candidate search.

When you click the Search button to find candidates, candidates meeting the selected search criteria are listed in the Search Results page.

Click the Filters tab to filter results using keywords or specific criteria.

Click the Advanced Filters tab to select more criteria to further refine your search results.

Note: Advanced filters must be enabled by your administrator. You also need the permission to access advanced filters.

3 Requisitions

Create a Requisition

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

1. On the Requisitions list, click **Create Requisition**.
2. Select the **Use a Template** option or the **Start from the beginning** option.
3. Select the hire type for the requisition.
4. Select a template if yo uselected that option.
5. Select attributes such as organization, location, job field.
6. When you're done, the requisition form is displayed and you complete all the information required in the form.
7. Click **Save**.

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

Submit a Requisition for Approval

When you're 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.

Approve a Requisition

When you're selected to approve a requisition:

1. Go to the requisition.
2. In the More Actions menu, select the **Decide on Approval** action.
3. In the Task details panel, indicate whether you approve or reject the requisition.
4. Click **Done**.

Post a Requisition to a Career Section

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

1. Go to the requisition Sourcing tab.
2. Expand the Career Sections section.
3. Click the **Add career sections** button to access the career sections selector. A list of default career sections and their posting schedule is displayed.
4. You can select a default career section or select other career sections.
5. Once you have selected a career section, you can:
   - Use the default posting schedule or modify it.
   - Mark the posting as urgent.
   - Set the **Apply Online** option before posting the requisition.
   - Add and remove career sections.
   - Unpost the requisition from a career section.
   - View the list of career section along with their posting status.

Post a Requisition to a Job Board

When a requisition has been approved, you can post it to job boards. Job board posting is available for requisitions posted on external career sections.

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

Use Staffing Agents to Refer Candidates

You can use the services of staffing agents who will refer candidates to a job.

1. Go to the requisition Sourcing tab.
2. Expand the Staffing Agents section.
3. Click the **Add Agents** button to access the staffing agents selector. The list of agents available is dependent on the organization, location, and job field selected for the requisition.
4. Select an agent and click **Add / Update Agents**.
5. Set the start and end date of the posting.
6. Click **Save and Apply**.

An email is sent to staffing agents inviting them to refer candidates for the job. The staffing agent signs in to the agency portal, locates the requisition, and refers a candidate. Candidates being referred receive an email informing them that they were referred by an agent for a job. Candidates are invited to review the profile information submitted by the agent. When you search candidates in the database, you can easily identify candidates referred by an agent with the **Candidate referred by an agent icon**.

Invite Candidates to Apply to a Requisition

You can invite candidates to apply to a requisition when they match criteria defined for the requisition.

When a requisition is posted on a career section, go to the requisition's Sourcing tab and expand the Invite Matching Candidates section. From there, you can view default matching criteria, default matching filters, and sources used to match candidates to the requisition.

Default matching criteria are set by your administrator. Use the edit icon next to Matching Criteria to modify these default criteria to find more relevant candidates for a particular requisition.

Default matching filters are also set by your administrator. Use the edit icon next to Resulting Invite List to modify these default filters.

You can also modify the list of sources used by candidates to apply for a job.

Once you have found the right candidates, click the Send Invite button to send an email to these candidates to invite them to apply for the job. Candidates receiving the invitation to apply can submit their applications using the career section portal.

Matching criteria are:

- Place of residence / Location
- Preferred Jobs / Job
- Preferred Locations / Locations
- Preferred Organizations / Organization
- Competencies
- Questions
- Job Level
- Job Type
- Schedule
- Shift
- Employment Status
- Education Level
- Travel
- Minimum Annual Salary

Matching criteria can be set as Required, Desired, or Ignore / Not Applicable:

- Required: The criterion is mandatory. The candidate has to meet this specific criterion to appear in the list of matching candidates.
- Desired: The criterion is not mandatory, it's considered an asset. Candidates who don't have an asset will be matched as long as they meet all the required criteria. Candidates who don't match a Desired criterion are not rejected. Candidates who meet all the Required criteria and who also meet some of the Desired criteria will appear at the top of the list of candidate displayed to the user.

- Ignore / Not Applicable

Matching filters are:

- Do not include active candidates if they reached the following selection process step
    - New
    - Reviewed
    - 1st, 2nd, 3rd Interview
    - Testing
    - Offer
    - Hired
    - Rejected
    - Declined
    - Inactive
    - Pipeline
- Include candidates that reside
    - All countries
    - The requisition country
    - The requisition state/province
    - The requisition region
- Include candidates if last update is older than
- Include candidates if
    - Internal
    - External
- Sourcing
    - Invite
    - Do not invite

> **Note:** To use this feature, you need these user permissions:
> - Match candidates to requisitions
> - Email Job Matching Candidates Default

Perform Actions on Requisitions

You can perform several actions on requisitions from the Requisitions list or using the More Actions menu in a requisition.

- **Duplicate**: 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.
- **Add Comments**: Use the Add Comments action in the requisition or requisition list to add a comment to the requisition.
- **Cancel**: Use the Cancel action when you no longer need the requisition. The Cancel action is available when the requisition has one of the following statuses: Approved, Scheduled, Posted, Unposted, Expired, Draft. The Cancel action is not available when at least one candidate has been hired for the requisition, or an offer was extended.
- **Delete**: Use the Delete action to remove the requisition from the list. The requisition status must be Draft.
- **Put on Hold**: Use the Put on Hold action to suspend all the activities associated with a requisition. The Put on Hold action is available when the requisition has one of the following statuses: Sourcing - Unposted, Sourcing - Expired, Draft, Approved, Rejected, To be Approved.
- **Reactivate**: Use the Reactivate action to reactivate a requisition that was put on hold. The requisition status must be On Hold.
- **Reopen**: Use the Reopen action to reopen a requisition previously filled or canceled. You have the option to cancel the current hiring or to add new openings.
- **Save as Open**: Use the Save as Open action to save a requisition and bypass any approvals that may be required. The requisition status must be Draft.
- **Fill Requisition**: Use the Fill Requisition action to indicate that the required number of candidates was hired for the requisition. The Fill Requisition action is available when the requisition has the following statuses: Open - Approved, Open - Posted, Open - Expired, Open - Unposted, Open - Scheduled.

View Tracking Details on a Requisition

You can view tracking details of events that occurred on a requisition.

1. Open a requisition.
2. Click the History tab. Events are listed in chronological order.
3. If you use the Previous and Next arrows to navigate to the next requisition on the list, you are taken directly to the History tab of that requisition.

Add Collaborators to a Requisition

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.

Set the ACE Alert to Identify Ideal Candidates

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 to Get Info from Candidates

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.

Option	Description
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.

Requisition List

Use the requisition list 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.
- Prescreen Alerts: 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: You can post requisitions on external and internal career sections, and on job boards. You can also use staffing agents to refer candidates for a requisition. This is also where you can invite candidates to apply to a requisition when they match criteria defined for the requisition.

- Interviews: 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're 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 summary 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.

When you're editing a requisition, the summary card displays a table of contents of the requisition sections. You can click section titles to quickly navigate to specific content.

Understanding the Prescreening Section in the Requisition

The Prescreening section in the requisition file may contain disqualification questions, prescreening questions, and competencies used to find the top candidates for a position. The combination of these three elements is referred to as ACE Prescreening because they help identify ACE or top candidates for a position.

- A disqualification question is a single-answer question that contains the minimum requirements for a candidate to be eligible for a job. For example "Are you entitled to work in the United States?" When candidates apply for a job, it's mandatory to respond to the disqualification questions. Answers to the disqualification questions decide if candidates move forward in the selection process or are automatically disqualified.
- You use a prescreening question to question candidates to learn more about their career goal, job preferences, knowledge, and more. For example you can ask "How good are your Java skills?". If the prescreening question is configured as mandatory, the candidate can't skip it while applying for the job.
- You use competencies to gather proficiency level and years of experience of a candidate. Competencies are supplied with the system, they are available in the Competencies Library and can be added in the Prescreening section of a requisition file.

You can perform several actions to prescreening questions and competencies in requisitions:

- You can add prescreening questions and competencies. Click the Add button. In the selector window, use filters to find the desired question or competency. Then add the question or competency to the requisition.
- You can reorder prescreening questions and competencies. Select an order number from the list. Click the Reorder button.
- You can remove prescreening questions and competencies. Select the question or competency. Click the Remove button
- You can configure prescreening result criteria. When you add prescreening questions and competencies to a requisition, you can specify if the question or competency is required for the position or if it's an asset. You can also add weight to questions and competencies to give them more consideration when prescreening candidates.

Use Attachments in a Requisition

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.

Manage Pipeline Requisitions

Pipeline requisitions are used to gather candidates who have the skills, background, and experience your organization is looking for. These candidates can later be added to a regular requisition for which they can eventually get hired.

You can create and manage pipeline requisitions. The creation process of a pipeline requisition is similar to a regular requisition. On the requisitions list, click Create Requisition. Select the type of pipeline requisition you want to create:

- Pipeline - General
- Pipeline - Executive

Complete the fields as for a regular requisition.

Note: To manage pipeline requisitions, you need these user permissions:

- Allow access to pipeline - general requisitions
- Allow access to pipeline - executive requisitions

4 Candidate Profiles

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. When you view the job submission, you can toggle between the general profile and submission of the candidate. The general profile view provides you with a better and more complete understanding 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.
- 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.

You can edit the general profile of a candidate. Click the Edit icon next to a section or the Edit All icon. Once you're in edit mode, a summary section appears on the left side of the page. You can click section titles to quickly navigate to specific content.

General Profile Summary Card

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

When you're editing the general profile of a candidate, the summary card displays a table of contents of the general profile sections. You can click section titles to quickly navigate to specific content.

Create a Candidate Profile

You can create a general profile for a candidate to quickly capture candidate information. There are various reasons why you may have to create a candidate profile. For example, you received a candidate's resume by email and you want to create a general profile from scratch.

1. Go to the **Submissions** list.
2. In the More Actions menu, select the **Create New Candidate** action.
3. Select the **Create a new candidate** option.
4. Click **Next**.
5. Select the language in which you want to create the candidate profile.

6. Select the desired form style.
7. Click **Next**.
8. If you have the resume of the candidate, you can upload it. The system will populate as many fields as possible. The file must not exceed 5120 kilobytes. It's format must be one of the following: Word (.doc, .docx), WordPerfect (.wpd), Text (.txt), Rich Text Format (.rtf), Hypertext Markup Language (.html, .htm), Portable Document Format (.pdf), Excel (.xls, .xlsx), OpenOffice Writer (.odt).
9. Enter basic info about the candidate such as the first name, last name, email address. The system will use that info to search for potential duplicates. If duplicates are found, they're listed on the page. You can then:
    - Open a duplicate file and edit it.
    - Create a new candidate profile.
    - Click Previous to go back to the previous page and enter new info to search for potential duplicates.
10. If you decide to create a new candidate profile, you need to enter info in the General Profile fields.

Generate a Password for a Candidate

Generate a password for a candidate from within the candidate's general profile.

1. Open a candidate file.
2. Go to the **General Profile** tab.
3. In the Account Information section, click **Generate New Password**.
4. If you want to see the password generated for the candidate, select **Show password**.

Use Attachments in a Candidate Profile

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.

5 Candidate Submissions

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. 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.

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.
- Referral: Contains referrals provided by candidates, employees, and agents.
- 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.
- Interviews:

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.

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.

Create a Candidate Submission

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.

Merge Candidate Submissions

Select potential duplicate candidate files and merge them into one file. When a merge occurs, the master candidate file's information is preserved and enriched with information from the other candidate files.

1. Go to the **Submissions** list.
2. Select two or more candidate files.
3. In the More Actions menu, select the **Merge Candidate Files** action. By default, the system selects the most recent file as the master candidate file, unless the oldest candidate file was a referral. You can select a different master file if desired.
4. Select the order in which the duplicate files will be merged into the master file.
5. You can remove unwanted candidate files.
6. Click **Merge Candidates**.

Candidate files are processed one at a time as per the configured sequence and only information that doesn't already exist is copied into the master file. After the merge, the master file is kept, and the candidate files used for the merge are deleted.

Share a Candidate Submission

Share candidate profiles with other recruiters who may be interested in such a profile to fill a position.

1. Select one or more candidate profiles (from submission list or candidate list).

2. In the More Actions menu, select the **Share Candidate** action.
3. Search for people with whom you want to share the candidate.
4. Click **Next**.
5. In the Share Candidate – Share Options window, select the sections of the candidate profile you want to share.
6. Click **Share Candidate**.

The recipients receive a notification about the profile that you just shared. They can view the info you shared.

Change the Step and Status of a Candidate Submission

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.

Revert a Candidate Submission Step and Status

You can use the Revert Latest Change of Step/Status action to go back to the previous step and status of a submission.

1. Go to the Submissions list.
2. Select a candidate submission file.
3. In the More Actions menu, select the **Revert Latest Change of Step/Status** action.
4. In the Revert Latest Change of Step/Status window, you can see the step and status that the submission will revert to.
5. Enter comments.
6. Click **Revert and Close**. Or click **Revert and Continue** if you want to revert back another step and status.

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 and attach files.

If the template contains unresolved tokens, these tokens are listed in the Missing Information panel. You can enter values for each token and click Apply to resolve the tokens within the message. You don't need to locate the tokens within 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. You can also attach files.

Add Comments to a Candidate Submission

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).

Use Attachments in a Candidate Submission

You can attach files to candidate submissions.

Access the Attachments tab of a candidate submission and click **Upload Attachment**. Indicate if the attachment is a resume, an offer-related file, or any other type of attachment. You can also indicate if the attachment is visible to the candidate. Once a file is attached to the submission, it appears in the corresponding section in the Attachments tab. You can then preview, edit, and delete it.

Note: To attach files, you need these user permissions:

- Attach a file (general)
- Attach a file (on preselected candidates)

View Tracking Details on a Candidate Submission

View all the events that occurred for a candidate submission in the History tab.

From the History tab, you can view events:

- For the current submission
- For all active submissions
- For the general profile and all submissions

Submission history entries are 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.

You can select the history event categories you want to display. Click the **Modify Categories** button and select events you want. You can also sort events by date and by the person who performed the event.

Request Screening Services for a Candidate

You can request screening services for candidates such as background checks, tax credit eligibility, candidate assessments.

When you open a candidate submission, select the **Request a Screening Service** action in the More Actions menu. Screening services configured for the requisition are available for selection. Select the service you want to request.

Note: To request a screening service, you need this user permission:

- Request services from Taleo partners

You can view results of screening services performed on candidates. When you open a candidate submission, go to the Screening Services tab. From there, you can view a summary of the results displayed in a table. Click the Show Details link to view a detailed report of the screening services performed on the candidate. If screening services were previously performed on the candidate, you can access historical results.

Note: To view screening results, you need these user permissions:

- Access Taleo partners summary results
- Access Taleo partners detailed results

Link Candidates to a Requisition

You can link a candidate to a requisition to create a prospect candidate profile associated with the job requisition. You can link multiple candidates at a time to more than one requisition.

1. Go to the Submissions list.
2. Select a candidate.
3. In the More Actions menu, select **Link to Requisition**.
4. Select a requisition then click the **Link to Requisition** button.
5. You can then choose to send an email to the candidate to if you need more info about their profile. Emails are sent only for posted requisitions, to avoid inviting candidates to requisitions they can’t see on the career section.

Once the candidate is linked to the requisition, they can continue their application process.

Start a Pre-Hire Onboarding Process

You can start a pre-hire onboarding process when candidates reach a specific step and status in the candidate selection workflow.

1. Open a candidate submission.
2. In the More Actions menu, select the **Start Pre-Hire Onboarding Process** action.
3. Select a process.
4. Enter comments.
5. Click **Start Process**.

Start a New Hire Onboarding Process

You can start a new hire onboarding process when candidates reach a specific step and status in the candidate selection workflow.

1. Open a candidate submission.
2. In the More Actions menu, select the **Start New Hire Onboarding Process** action.
3. Select a process.
4. Enter comments.
5. Click **Start Process**.

6 Offers

Create an Offer

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 an Offer 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.

Approve an Offer

When you're selected to approve an offer for a candidate:

1. Go to the candidate submission.
2. In the More Actions menu, select the **Decide on Approval** action.
3. In the Task details panel, indicate whether you approve or reject the offer.
4. Click **Done**.

Extend an Offer

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: When you use the E–offer 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.
- 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.

E-Offer

With the advanced E-Offer process, organizations who have more complex electronic offer requirements can configure advanced electronic offer workflows in Onboarding (Transitions) for use in Recruiting.

As a recruiter, you can extend offers electronically to a candidate using the advanced E-Offer process. Depending on how your administrator configured the process, candidates may receive an email notification containing a URL link that they click to access a secure career section portal where they can view offer details online. Once they signed in into the portal, candidates are brought to the Tasks tab where they can view and print the offer and offer letter attachments, if any. Candidates indicate if they accept or refuse the offer. They must complete any mandatory fields which may include an electronic signature. As soon as candidates respond to the offer, the candidate submission status changes to Offer - Accepted or Offer - Refused, depending on the candidate's response. A tracking event is added in the History tab of the candidate submission.

Depending on how your administrator configured the process, you may receive an email notification which contains the candidate's response, e-signature information, and any relevant info. You can then move the candidates to the next step in the selection process.

> **Note:** To use e-offer, you need this user permission: Extend Offers Electronically

Send an Offer

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.

Capture the Candidate's Response to an Offer

You can capture the response to an offer on behalf of a candidate. For example, you can capture the response if a candidate contacts you to give a response before responding to the offer online.

Use the **Capture Offer Response** action in the More Actions menu.

Three responses are available:

- The candidate accepted the offer. Indicate the date when the offer was accepted and the start date of the candidate.
- The candidate wants to negotiate the offer. Indicate the reasons.
- The candidate refused the offer. Indicate the reasons.

Capture the Candidate's Response as Soon as the Offer is Extended

When you extend an offer verbally, you can select the option "Capture offer response (after extending)".

Possible answers to the offer are:

- The candidate accepted the offer. If you select this option, indicate the date when the offer was accepted and the start date of the candidate.
- The candidate wants to negotiate the offer. If you select this option, indicate the reasons.
- The candidate refused the offer. If you select this option, indicate the reasons.

7 Evaluations

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.

8 LinkedIn Recruiter System Connect

LinkedIn Recruiter System Connect Overview

Use LinkedIn Recruiter System Connect (RSC) to integrate LinkedIn Recruiter with Oracle Taleo Enterprise Edition.

To use LinkedIn RSC, you must be using:

- Oracle Taleo Enterprise Edition, with Fluid Recruiting deployed to the recruiter population.
- Oracle Human Capital Management (HCM) Cloud for Core HR and Talent.

Key Capabilities in LinkedIn Recruiter

In LinkedIn Recruiter, recruiters who have connected their LinkedIn seat licence to their Taleo user account can view the following information from Oracle Taleo Enterprise Edition:

- See the "In ATS Indicator" which indicates that a LinkedIn member has a candidate file in Fluid Recruiting.
- View candidate submissions of those members and their progression within the selection workflow, across the user groups the recruiter is a member of.
- View source tracking information of those submissions.
- Choose an open requisition from across the user groups the recruiter is a member of, and create submissions for LinkedIn members, which will appear in Oracle Taleo Enterprise Edition.
- Use the Send InMail feature to interact with prospects. These emails also appear in Fluid Recruiting.
- Use the Notes feature to enter comments. These notes also appear in Fluid Recruiting.

Key Capabilities in Fluid Recruiting

Here are the key capabilities for recruiters in Fluid Recruiting.

- See which candidates are LinkedIn members. In the Submissions list, job submissions, and candidate profiles, a blue LinkedIn icon appears for candidates who were automatically matched by LinkedIn Recruiter System Connect.
- View the LinkedIn profile of a candidate from the Submissions list, job submissions, or candidate profiles by clicking the blue LinkedIn icon. Seat holders and non-seat holders have different actions available to them. Your arrangements with LinkedIn will determine whether non-seatholders will be able to see the member's profile in the Profile Widget.
- Users who have been granted a LinkedIn Recruiter seat license can connect that seat to their Taleo user account.
    a. In Fluid Recruiting, click the arrow next to your login name.

   b. Click Connect.
   c. A page may appear to request that you authenticate into LinkedIn, if your device is not already authenticated.
   d. A window appears where you grant LinkedIn permission to bring information about you from LinkedIn into Taleo.

- After making that connection, these users can:
  - View LinkedIn Notes and InMails in the candidate profile History tab. These new history events have their own category for easy filtering.
  - Manually link a candidate to a LinkedIn member, where the RSC service did not find an automatic match. These candidates are displayed with a grey LinkedIn icon.