Oracle Fusion Cloud Talent Management

How do I set up candidate messaging?

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1 How do I set up candidate messaging?

Introduction

Scope of this Playbook

This playbook is intended for an HCM application administrator to set up candidate messaging in Recruiting. It also includes setup and configuration information for two-way candidate communications and Message Center in Recruiting Booster.

As an administrator, you'll learn how to set up and configure:

- One-way email communications in Recruiting
- One-way SMS communications in Recruiting
- Two-way email communications in Recruiting Booster
- Two-way SMS communications in Recruiting Booster
- Message Center in Recruiting Booster

What's Candidate Messaging?

Recruiters and hiring managers can send emails, SMS messages, or both to candidates from Recruiting. They can send these messages using preconfigured email or SMS templates, or by creating messages from scratch. All communications to candidates regarding their applications, interviews, job offers can be delivered using these channels.

The preconfigured email and SMS templates are available in the Recruiting Content Library for different types of notifications such as Candidate Job Application Notification, Hiring Team Notification, and so on.

One-Way Candidate Communications

One-way candidate communications refers to the ability to send email and SMS messages to external candidates and emails to internal candidates. Recruiters and hiring managers can create an email or text message to start a conversation with an external or internal candidate about their job applications, interviews, job offers, or have any casual conversation with them.

A **Messages** tab is available in candidate job applications, prospect records, candidate profiles, candidates in candidate pools.

Two-Way Candidate Communications

Two-way candidate communications refers to the ability to not only send outgoing messages but also receive incoming messages from candidates. The two-way communications feature is available when Recruiting Booster is enabled.

Using this feature, recruiters and hiring managers can start a conversation with a candidate through email, SMS, or both and also receive their replies. The hiring team can also reply to messages received from candidates. The hiring team can

send and reply to email and SMS messages from the **Messages** tab in Recruiting. They can also send emails through their own email application (such as Microsoft Outlook, Gmail, Mozilla Thunderbird).

All messages across the application such as job application confirmation, invitation to apply, interviews, and job offers can be viewed from the **Messages** tab.

Candidates can start an email conversation as long as they know the company's vanity email address.

- If the candidate is available in Oracle Recruiting, that communication is saved as part of the candidate's profile. The hiring team can later reply to that candidate communication from Oracle Recruiting. Note that this communication can't be attached to any job application as there's no context to that communication started by the candidate.
- If the incoming email isn't associated with any candidate, then the message is discarded.

Note: Two-way communication with SMS currently works with Twilio and Syniverse providers only. As an administrator, make sure that the proper provider setup is done before you enable two-way communication. For two-way SMS communication to work correctly, you need to have a long code number that supports accepting incoming messages.

Message Center

When the Redwood experience is enabled in Recruiting Booster, recruiters and hiring managers can have a consolidated view of all communications exchanged with a candidate in any context through a centralized messaging hub called Message Center. This is available on the **Messages** tab, in **My Client Groups** > **Hiring**. The hiring team can send and reply to messages from this tab.

Choosing Between Email and SMS

By default, candidate communications are delivered through email. However, as an administrator, you can configure and enable the SMS communications feature in Setup and Maintenance.

When this feature is enabled, the application allows candidates to register or sign in using either their email or phone number. When it's not enabled, candidates will always register using their email and they will receive emails by default.

The candidate's preferred communication channel is decided by the method they use during their initial job application:

- If they register with their phone number, SMS becomes their preferred communication channel. They receive only SMS messages and not emails, until they change their preferences.
- If they register with an email address, email becomes their preferred communication channel. They continue to receive only emails and not SMS messages, until they change their preferences.
- After they sign in, candidates have the option to opt in for both email and SMS as their preferred communication channels. In this case, they receive both SMS messages and emails.

When SMS communications is enabled, the following rules apply:

- If you're using preconfigured templates from the Recruiting Content Library, and they contain both email and SMS content, candidates will receive messages according to their communication preferences.
- If the organization decides to send only emails to candidates, the SMS message content in the Recruiting Content Library must be empty. In this case, candidates will receive emails even if SMS is their preferred communication method.

What Types of Email Addresses Are Used?

A recruiter or hiring manager can use two different email addresses for their email communications with external and internal candidates.

- Vanity email: A vanity email is used to brand the "from email" to make it friendlier and easy to read. This email can be used when your organization wants to track candidate communications in Recruiting.
    - Vanity email is a prerequisite for enabling two-way communication. We use a dedicated vanity email box to send emails to candidates and receive their replies.
- No-reply email: The no-reply email can be used when your organization doesn't need to track or process replies sent by candidates. Automated notifications related to job alerts, campaigns, or candidate verifications (containing the PIN number) are usually sent using the no-reply email.

To take advantage of these features, it's recommended to use separate mailboxes for the vanity email and no-reply email.

SMS Setup

Workflow to Set Up One-Way SMS Communications

Here are the steps to set up one-way SMS communications in Recruiting, which enables the hiring team to send outgoing SMS messages to internal and external candidates.

Required Steps

1. *Add an SMS Messaging Provider*
2. *Enable SMS Communications and Set Limits for Outbound SMS*

Optional Steps

Although these steps are optional, it's recommended to complete them:

- *Block Phone Numbers or Phone Number Patterns*
- *Configure List of Countries to Send SMS Messages*
- *Enable Candidates to Opt Out of SMS Messages*

Related Topics

- Profile Options for Messaging

Workflow to Set Up Two-Way SMS Communications

Here are the steps to set up two-way SMS communications when Recruiting Booster is enabled. This enables the hiring team to send and receive SMS messages to and from internal and external candidates.

Required Steps

1. *Opt in to Recruiting Booster*
2. *Add an SMS Messaging Provider*
3. *Enable SMS Communications and Set Limits for Outbound SMS*
4. *Enable Two-Way Communications on Active SMS Messaging Provider*
5. *Configure the Profile Option to Read SMS from a Given Start Date*
6. *Run the Scheduled Process for Inbound Messages*

Optional Steps

Although these steps are optional, it's recommended to complete them:

- *Add an SMS Messaging Provider for the Text Assistant*
- *Enable AI Assist for Compose and Reply Actions*
- *Block Phone Numbers or Phone Number Patterns*
- *Configure List of Countries to Send SMS Messages*
- *Enable Candidates to Opt Out of SMS Messages*
- *Set Up Email Notifications for Candidate SMS Replies*

Related Topics

- Profile Options for Messaging

Set Up One-Way SMS Communications

Add an SMS Messaging Provider

You need to create and activate a messaging provider that will be used for communicating with candidates using SMS.

Please ensure that SMS configurations are different for each pod—production and other test pods.

1. In the Setup and Maintenance work area, go to:
    - Offering: Recruiting and Candidate Experience
    - Functional Area: Recruiting and Candidate Experience Management
    - Task: Recruiting Messaging Configuration
2. On the Recruiting Messaging Configuration page, in the SMS Messaging Providers section, select **Add**.
3. Enter a name and description.
4. Select a provider.

5. Based on the provider you selected, enter info in the Request Details, Authentication, Headers, and Body sections. For details, see the document *Examples of Adding an SMS Provider* on My Oracle Support (ID 2657006.1).

   > **Note:** For processing outbound messages, the SMS messaging provider's API is expected to return the response in JSON format. To ensure smooth processing of these messages, we recommend that you include the **Accept** header in the Headers section and specify its value as **application/json**.

6. Select **Test Outbound Message** to send a test message and make sure that the configuration is properly done.
7. Select **Save and Close**.
8. On the SMS Messaging Providers list, set the provider you added to **Active**.

Enable SMS Communications and Set Limits for Outbound SMS

When you enable SMS communications, candidates can apply for jobs and review their profile in their candidate self-service using their phone number. The Recruiting Content Library provides SMS message templates in addition to existing email templates.

Before you start

- At least one active messaging provider is needed to enable SMS communications.
- A valid SMS provider license is required before you enable the SMS communications.
- You can select Twilio, Syniverse, or any other SMS provider whose services can be initiated using REST services. You should use the SMS provider's developer documentation to configure the services and account credentials needed in the Recruiting product.
- When enabling SMS communications, you need to set limits for SMS messages that can be sent across Recruiting to all candidates and the number of messages that can be sent to each candidate in a day. If you're enabling SMS communications for the first time, you can enable it only if you set these limits. If you already enabled SMS communications in the past, but didn't specify SMS limits, you'll now see predefined limits set based on your past usage. If you already enabled SMS communications and specified SMS limits in the past, those limits will continue to apply. This feature is useful to limit the volume of outbound text messages sent using third party services like Twilio or Syniverse. It also helps limit the cost of usage based service and prevent unexpected spikes in cost.

Here's what to do

1. In the Setup and Maintenance work area, go to:
   - Offering: Recruiting and Candidate Experience
   - Functional Area: Recruiting and Candidate Experience Management
   - Task: Recruiting Messaging Configuration
2. In the Limit for SMS and WhatsApp Messages section, select **Edit**.
3. Configure all these options in the SMS Limits column:
   - Maximum number of messages that can be sent in a day: This defines the total number of messages that can be sent from Recruiting in a day across all candidates by different hiring team members. This is called the system hard limit. All messages that are sent after this limit is reached are blocked for that day and appear in the **Messages** tab as Blocked. When this limit is reached, a notification is sent to the administrator. Blocked messages are never attempted to be sent automatically to the candidate.
   - Maximum number of messages that can be sent per candidate in a day: This defines the number of messages that can be sent to a single candidate in a day by different hiring team members. This is also called as the candidate message limit. All messages that are sent after this limit is reached are blocked for that day and appear in the **Messages** tab as Blocked. Blocked messages are never attempted to be sent automatically to the candidate.

- Number of messages that triggers a warning notification: This defines the number of messages that can be sent across Recruiting. This is called the system soft limit. After this number is reached, a warning email is sent to the administrator. This number should be less than the maximum limit that can be sent in a day.

Note:

- UTC time zone is considered when counting the limits.
- The system hard limit and candidate message limit are reset to zero at the start of UTC day, at 00:00:00 hours. When the limits are reset, you can send new messages the next day. If you're using the Redwood version of Recruiting, you can resend the blocked messages the next day from the **Messages** tab.
- Candidates will be informed through the career site when the system hard limit or the candidate message limit is reached for the day.
- Recruiters can't send messages manually when the system hard limit or the candidate message limit is reached. If automated messages are initiated, they go to the Blocked status.

4. Select **Save**.
5. On the Recruiting Messaging Configuration page, in the SMS Messaging Providers section, select the option **Enable SMS Communications**.

Related Topics

- Limit Volume of Outbound SMS Messages

Set Up Two-Way SMS Communications

Add an SMS Messaging Provider

You need to create and activate a messaging provider that will be used for communicating with candidates using SMS.

Please ensure that SMS configurations are different for each pod—production and other test pods.

1. In the Setup and Maintenance work area, go to:
   - Offering: Recruiting and Candidate Experience
   - Functional Area: Recruiting and Candidate Experience Management
   - Task: Recruiting Messaging Configuration
2. On the Recruiting Messaging Configuration page, in the SMS Messaging Providers section, select **Add**.
3. Enter a name and description.
4. Select a provider.
5. Based on the provider you selected, enter info in the Request Details, Authentication, Headers, and Body sections. For details, see the document *Examples of Adding an SMS Provider* on My Oracle Support (ID 2657006.1).

Note: For processing outbound messages, the SMS messaging provider's API is expected to return the response in JSON format. To ensure smooth processing of these messages, we recommend that you include the **Accept** header in the Headers section and specify its value as **application/json**.

6. Select **Test Outbound Message** to send a test message and make sure that the configuration is properly done.
7. Select **Save and Close**.
8. On the SMS Messaging Providers list, set the provider you added to **Active**.

Enable SMS Communications and Set Limits for Outbound SMS

When you enable SMS communications, candidates can apply for jobs and review their profile in their candidate self-service using their phone number. The Recruiting Content Library provides SMS message templates in addition to existing email templates.

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- A valid SMS provider license is required before you enable the SMS communications.
- You can select Twilio, Syniverse, or any other SMS provider whose services can be initiated using REST services. You should use the SMS provider's developer documentation to configure the services and account credentials needed in the Recruiting product.
- When enabling SMS communications, you need to set limits for SMS messages that can be sent across Recruiting to all candidates and the number of messages that can be sent to each candidate in a day. If you're enabling SMS communications for the first time, you can enable it only if you set these limits. If you already enabled SMS communications in the past, but didn't specify SMS limits, you'll now see predefined limits set based on your past usage. If you already enabled SMS communications and specified SMS limits in the past, those limits will continue to apply. This feature is useful to limit the volume of outbound text messages sent using third party services like Twilio or Syniverse. It also helps limit the cost of usage based service and prevent unexpected spikes in cost.

Here's what to do

1. In the Setup and Maintenance work area, go to:
    - Offering: Recruiting and Candidate Experience
    - Functional Area: Recruiting and Candidate Experience Management
    - Task: Recruiting Messaging Configuration
2. In the Limit for SMS and WhatsApp Messages section, select **Edit**.
3. Configure all these options in the SMS Limits column:
    - Maximum number of messages that can be sent in a day: This defines the total number of messages that can be sent from Recruiting in a day across all candidates by different hiring team members. This is called the system hard limit. All messages that are sent after this limit is reached are blocked for that day and appear in the **Messages** tab as Blocked. When this limit is reached, a notification is sent to the administrator. Blocked messages are never attempted to be sent automatically to the candidate.
    - Maximum number of messages that can be sent per candidate in a day: This defines the number of messages that can be sent to a single candidate in a day by different hiring team members. This is also called as the candidate message limit. All messages that are sent after this limit is reached are blocked for that day and appear in the **Messages** tab as Blocked. Blocked messages are never attempted to be sent automatically to the candidate.

- Number of messages that triggers a warning notification: This defines the number of messages that can be sent across Recruiting. This is called the system soft limit. After this number is reached, a warning email is sent to the administrator. This number should be less than the maximum limit that can be sent in a day.

Note:

- UTC time zone is considered when counting the limits.
- The system hard limit and candidate message limit are reset to zero at the start of UTC day, at 00:00:00 hours. When the limits are reset, you can send new messages the next day. If you're using the Redwood version of Recruiting, you can resend the blocked messages the next day from the **Messages** tab.
- Candidates will be informed through the career site when the system hard limit or the candidate message limit is reached for the day.
- Recruiters can't send messages manually when the system hard limit or the candidate message limit is reached. If automated messages are initiated, they go to the Blocked status.

4. Select **Save**.
5. On the Recruiting Messaging Configuration page, in the SMS Messaging Providers section, select the option **Enable SMS Communications**.

Related Topics

- Limit Volume of Outbound SMS Messages

Enable Two-Way Communications on Active SMS Messaging Provider

You need to enable the two-way SMS communications feature.

Before you start

- At least one SMS provider needs to be Active.
- SMS communications should be enabled.
- The phone number that you use for two-way communications must support incoming SMS messages.

Here's what to do

1. Open the new provider you created, and select the option **Enable Two-Way SMS Communications**.
2. Select **Test Inbound Message** to make sure that the configuration is properly done.
3. Select **Save and Close**.

Configure the Profile Option to Read SMS from a Given Start Date

You can configure a profile option called ORA_IRC_2_WAY_SMS_LAST_SYNC_TIME to read SMS messages from a specific start date and time.

When you enable two-way SMS communications, this profile option is automatically set to the date and time when you enabled the feature. The Recruiting application will start processing SMS messages that were received from that date and time onward.

This profile option is referenced by the Process Recruiting Inbound Message scheduled process, which updates the date and time automatically to the current date and time when it completes running. So, for example, if the profile option

value was initially set to a date last week, and the scheduled process runs today, SMS messages will be processed from last week until today. After the scheduled process completes running, it'll set the profile option value to today's date. This will ensure that messages will be read from today onward, when the scheduled process runs next time.

If you need to read SMS messages from a different date and time, you can manually update this profile option value. This set up step is optional.

1. In the Setup and Maintenance work area, select the **Tasks** icon.
2. Select **Search**.
3. On the Search page, search for the task **Manage Administrator Profile Values**.
4. Select the task name.
5. On the Manage Administrator Profile Values page, search for the profile option code **IRC_2_WAY_SMS_LAST_SYNC_TIME**.
6. Set the profile value to the desired start date and time from which SMS messages should be read. It's recommended to set this value to five days before the current date. Use the UTC date and time in standard ISO 8601 format: YYYY-MM-DD HH:MM:SS to enter the value.

   > **Note:** In the case of Twilio, if you set this value to a date beyond 400 days in the past, it will automatically default to 400 days in the past.

7. Select **Save and Close**.

Run the Scheduled Process for Inbound Messages

You need to run the Process Recruiting Inbound Message scheduled process with a 15-minute frequency to see candidates' SMS and email replies.

1. From the navigation menu, go to **Tools** > **Scheduled Processes**
2. On the Overview page, select **Schedule New Process**.
3. On the Schedule New Process page, select the menu and select **Search**.
4. Search for the **Process Recruiting Inbound Message** process.
5. Select **OK**.
6. On the Process Details page, submit the process.

Optional Configuration for SMS

Block Phone Numbers or Phone Number Patterns

You can prevent sending SMS or WhatsApp messages to unauthorized phone numbers by blocking those numbers or by blocking those numbers that match a specific pattern. After you add the blocked list, any SMS or WhatsApp messages that are sent to these numbers or patterns will be blocked in Recruiting. You can see the Blocked status and the reason for the block when you open the SMS or WhatsApp message.

An error message is displayed to candidates on the career site when they provide a number that's on the blocked numbers and patterns list.
To enable this feature, you need to add the phone numbers or phone number patterns to a CSV file, compress the file, and then upload it using the Recruiting Messaging Configuration task.

These are the specifications of the CSV file:

- Each compressed file should contain only one CSV file.

- The file size must not exceed 2 MB.
- You must upload separate files, one for phone numbers and another for phone number patterns.

Here are a few things to consider about the file used for uploading phone numbers:

- The CSV file must contain only one column and it must not be empty.
- If the phone number contains a + sign or a comma or brackets, you must enclose them within double quotes.
- The phone number must include the country code and area code.

Here are a few things to consider about the file used for uploading phone number patterns:

- The CSV file must contain only one column and it must not be empty.
- You need to use regular expression patterns for phone number patterns. For example, to block phone numbers beginning with 1800, use a regular expression such as `1800.*`

Note: Using this task, you can also unblock phone numbers or phone number patterns that were blocked earlier.

1. In the Setup and Maintenance work area, go to:
    - Offering: **Recruiting and Candidate Experience**
    - Functional Area: **Recruiting and Candidate Experience Management**
    - Task: **Recruiting Messaging Configuration**
2. If you haven't uploaded phone numbers or phone number patterns so far, you can download a sample file from the downloadable links available in the Block Phone Numbers or Patterns section. Next, select **Edit** in this section.
3. From the **Manage Phone Numbers or Patterns** list, select one of these options:
    - **Add Phone Numbers**: Block phone numbers.
    - **Add Patterns**: Block phone number patterns.
    - **Delete Phone Numbers**: Unblock phone numbers.
    - **Delete Patterns**: Unblock phone number patterns.
4. For each of the above actions, upload a separate CSV file that contains the numbers or patterns. So if you're using a CSV file to block some phone numbers, you must upload a different CSV file for unblocking some phone numbers.

    If you'd blocked some phone numbers earlier, the new phone numbers that you upload now will get added to the blocked list.
5. Select **Save**.

What to do next

You can also download the list of blocked phone numbers or phone number patterns by selecting the respective download links. For SMS messages, you can generate a report from the Reports for Text Messages section in this task to understand how many SMS messages were blocked per country.

In the Redwood version of Recruiting, you can resend blocked SMS messages, if you unblock the phone numbers or phone number patterns.

Configure List of Countries to Send SMS Messages

Using the Recruiting Messaging Configuration task, you can define the list of allowed countries that can receive SMS messages. Earlier, you could define this using the profile option ORA_IRC_SMS_ALLOW_LIST. From upgrade 25A, this profile option is replaced with the Recruiting Messaging Configuration task. Any country codes that you earlier specified

using the profile option are carried over to the Recruiting Messaging Configuration page. If you're currently sending SMS messages to countries outside this list, they'll not be sent. An error message is also displayed to candidates on the career site when they provide a number that's not in this allowed list.

1. In the Setup and Maintenance work area, go to:
    - **Offering**: Recruiting and Candidate Experience
    - **Functional Area**: Recruiting and Candidate Experience Management
    - **Task**: Recruiting Messaging Configuration
2. In the Allowed List of Countries for SMS section, select **Edit**.
3. Select the **Create** icon (displayed as +).
4. Select the country from the list that appears.

    Note: When you select a country that has the same country code as another country, both countries will be added to this list. For example, when you select United States, Canada will also be added because it has the same country code.

5. Select **Save**.

What to do next

When you configure the list of allowed countries, any text messages that are sent to countries outside of the allowed list will be blocked in Recruiting. You can see the **Blocked** status against the message along with the reason for the block in the Text Messages section of the **Messages** tab. In the Redwood version of Recruiting, you can resend blocked messages, after you add that country to the allowed list.

Enable Candidates to Opt Out of SMS Messages

Candidates have the flexibility to opt in or opt out of SMS communications. To stop receiving SMS messages, they can send an SMS with a STOP keyword or similar. To resume receiving messages, they can send an SMS with a START keyword or similar.

This feature uses the Webhook functionality and is applicable to Twilio and Syniverse service providers only.

These predefined profile options and values are available by default in the Settings and Maintenance area. The keywords sent by the candidate to start or stop SMS messages are validated against these profile values.

Profile Option	Default Values
ORA_IRC_CAND_SMS_OPTOUT_PATTERN	STOP, STOPALL, UNSUBSCRIBE, CANCEL, END, QUIT
ORA_IRC_CAND_SMS_OPTIN_PATTERN	START, UNSTOP

Note: If the service provider has configured an opt-out management feature, the keywords are validated against it. It's recommended that the keywords specified in the opt-out management feature match these profile values.

Here are a few things to note when a candidate opts out of SMS communications:

- SMS is removed as the preferred communication channel. The **Compose** button is disabled in the Messages section in Recruiting.

- If the candidate's email is verified, it's automatically set as their preferred communication channel. The candidate is also notified about the change. The email notification is based on this template in the Recruiting Content Library:
  - **Category**: Candidate Profile Notification
  - **Content Item Name**: Email Notification to Candidate for Updated Communication Channel
  - **Code**: SMS_OPTOUT_CAND_COMM_PREF_UPD

  > **Note:** When the candidate opts into SMS communications again, SMS is set as their preferred communication channel along with email.

- If the candidate's email isn't present or verified, the hiring team can't send any communications from Recruiting. However, they can call the candidates for any urgent communications. When the candidate opts into SMS communications again, SMS is set as their preferred communication channel.

To use this feature, you must configure the Webhook URL in the service provider's account. You can also configure the opt-out management feature in Twilio. For details, see the document Webhook Setup for Two-Way SMS Communications on My Oracle Support (ID 2936718).

Related Topics

- Webhook Setup for Two-Way SMS Communications

Set Up Email Notifications for Candidate SMS Replies

Here are the prerequisites and steps to set up email notifications when candidates send SMS replies:

Before you start

Ensure that you've set up two-way SMS communications.

Consider the following info while setting up email notifications:

- You must use a business phone number that supports two-way messaging and not use a short code number.
- This feature currently works with Twilio and Syniverse providers only.

Here's what to do

1. *Configure Webhook in the service provider's account.*
2. *Configure email notification settings when candidates reply to SMS messages.*

Configure Webhook for SMS Service Providers

You must configure Webhook in the SMS service provider's account to establish a Webhook connection between Recruiting and the SMS service provider. To do so, follow these steps:

1. Create a job role in Recruiting.
2. Add the following functional privilege to it:
   - Name: **Use REST Service - Inbound SMS Webhook**
   - Code: **IRC_REST_SERVICE_ACCESS_INBOUND_SMS_WEBHOOK_PRIV**
3. Create a user account for the SMS provider, and add the job role to the account.

   The user account that's set up to access Webhook must not have any other privileges or roles associated with it, except the job role that you just created.

4. Apply security roles by running these scheduled processes:
    - **Import User and Role Application Security Data**
    - **Retrieve Latest LDAP changes**
5. Configure the Webhook functionality in the active SMS provider's account. For details, see the document Webhook Setup for Two-Way SMS Communications on My Oracle Support (ID 2936718).

Related Topics

- Create Roles in the Security Console
- Webhook Setup for Two-Way SMS Communications

Configure Email Notification Settings for Candidate Replies to SMS Messages

When candidates send SMS replies to the hiring team, you can configure whom to notify on the hiring team and when to notify them.

1. In the Setup and Maintenance work area, go to:
    - Setup: **Recruiting and Candidate Experience**
    - Functional Area: **Recruiting and Candidate Experience Management**
    - Task: **Recruiting Messaging Configuration**
2. In the Hiring Team Notification for Text Message Replies section, select **Edit**.
3. You can choose to notify everyone who had an active SMS conversation with the candidate. You can include recruiters, hiring managers, or both, for job-application or prospect-based active conversations.

   When anyone sends a message from the candidate profile or candidate pools pages, they will receive an email notification when the candidate replies to their message. It isn't affected by the choices you make using this option.
4. Enter the maximum number of days an SMS conversation between a candidate and a hiring team member is considered active. For example, let's say you specify 20 days. If a hiring team member sent an SMS to a candidate in the last 20 days, and the candidate replied to it, an email notification will be sent to all those hiring team members who started a conversation with the candidate during this active conversation period. Also, if you choose to notify recruiters and hiring managers, they will receive an email notification if they're a part of a requisition that's related to the active conversation.

   The default value for this setting is 15 days and is configured in the predefined profile option **ORA_IRC_INBOUND_SMS_ACTIVE_CONVERSATION_PERIOD**.
5. Enter the number of hours within which a reply received from a candidate is considered for sending an email notification. For example, let's say you specify 120 hours. If a candidate's reply SMS is received within this time frame and is processed by the scheduled process, an email notification will be sent to the hiring team. Let's say the candidate sent an SMS message before 120 hours and it was missed during the previous Webhook sync. In this scenario, when the scheduled process runs next time, it'll bring the SMS message into the application, but won't trigger an email notification to the hiring team because the reply received from the candidate was before 120 hours.

   It's recommended to keep the number of hours setting shorter and lesser than the maximum number of active conversation days. The default value for this setting is 120 hours and is configured in the predefined profile option **ORA_IRC_INBOUND_SMS_NOTIFICATION_PERIOD**.
6. Select **Save**.

Related Topics

- How do I enable a profile option?

Email Setup

Workflow to Set Up One-Way Email Communications

Here are the steps to set up one-way email communications in Recruiting, which enables the hiring team to send outgoing email messages to internal and external candidates.

Required Step

- *Enable Vanity Email*

Optional Steps

These are optional but recommended steps:

- *Enable Alternate Email for Internal Candidate Communications*
- *Specify the Size Limit for Emails*
- *Enable Candidates to Unsubscribe from Marketing Emails*
- *Using Design Templates for Emails*

Related Topics

- Profile Options for Messaging

Workflow to Set Up Two-Way Email Communications

Here are the steps to set up two-way email communications when Recruiting Booster is enabled. This enables the hiring team to send and receive email messages to and from internal and external candidates.

Required Steps

1. *Enable Vanity Email*
2. *Opt in to Recruiting Booster*
3. *Set Up an Email Messaging Provider*
4. *Enable Two-Way Communication for Email*
5. *Create the Profile Option to Read Email Messages from a Given Start Date*
6. *Configure the No-Reply Email*
7. *Set Up a Work Email for Two-Way Email Communication*
8. *Run the Scheduled Process for Inbound Messages*

Optional Steps

Although these steps are optional, it's recommended to complete them:

- *Enable Candidates to Unsubscribe from Marketing Emails*

- *Enable AI Assist for Compose and Reply Actions*
- *Configure Notifications for Candidate Replies to Automated Emails*
- *Enable Alternate Email for Internal Candidate Communications*
- *Enable Email Attachments*
- *Specify the Size Limit for Emails*
- *Manage File Types for Email Attachments*
- *Using Design Templates for Emails*

Related Topics

- Profile Options for Messaging

Workflow to Set Up the Email Assistant

Here are the steps to set up the Email Assistant in Recruiting, which enables the AI Agent to respond to candidate emails.

The email assistant is available in Oracle AI Agent Studio through the agent template, **Recruiting Email Assistant Template**. This template consists of a child workflow called Recruiting Inbox Response Agent and a RAG tool, **Recruiting Knowledge Factory**. You need to upload your organization's policy and process documents in this tool. The agent workflow refers to these documents for answering candidate emails.

Required Steps

1. *Prerequisites for AI Agent Studio*
2. *Configure the Recruiting Email Assistant Template*
3. *Upload Documents to the Recruiting Knowledge Factory Tool*
4. *Enable the Recruiting Inbox Response Agent*
5. *Enable the Recruiting Inbox Document Processing Agent*
6. *Configure Profile Options for the Email Assistant*
7. Ensure that the Process Recruiting Inbound Messages scheduled process runs periodically to process incoming messages. For details, see *Run the Scheduled Process for Inbound Messages*.

Workflow to Set Up the Recruiting Inbox Screening Agent

Set up the Recruiting Inbox Screening Agent to identify inappropriate content in inbound candidate emails, SMS messages, and WhatsApp messages. The agent masks inappropriate message text for users without the required privilege and can add a label to candidates whose messages contain inappropriate content.

Steps

1. Enable at least one of these communication channels:
    - *Workflow to Set Up Two-Way Email Communications*
    - *Workflow to Set Up Two-Way SMS Communications*
    - *Workflow to Set Up Two-Way WhatsApp Communications*

2. In the Setup and Maintenance work area, go to **Recruiting and Candidate Experience** > **Recruiting and Candidate Experience Management**, and use the **Manage Recruiting Labels** task to define the candidate labels that you want to use.
3. Complete the *Prerequisites for AI Agent Studio*.
4. *Schedule the Recruiting Inbox Screening Agent*
5. *Enable the Recruiting Inbox Screening Agent*
6. By default, recruiting manager users have the View Inappropriate Message Content (IRC_VIEW_INAPPROPRIATE_MESSAGE_CONTENT_PRIV) privilege. This privilege allows users to view unmasked message content.
7. Optional: *Configure Reply Availability for Inappropriate Messages*.

Set Up One-Way Email Communications

Enable Vanity Email

You can set up one vanity email for your organization. If your organization has multiple career sites, only one vanity email can be created.

The vanity email address is used to send emails to external candidates, for both one-way and two-way communications.

When two-way communications is enabled, the vanity email is used to send emails to internal candidates as well. When it isn't enabled, internal candidates receive alert notifications.

Enable the Vanity Email

You need to define the vanity email address and its display name. By default, emails manually sent or replied to by recruiters show the recruiter's user name. You can show the vanity display name instead.

1. In the Setup and Maintenance work area, go to:
    - Offering: **Recruiting and Candidate Experience**
    - Functional Area: **Recruiting and Candidate Experience Management**
    - Task: **Recruiting Messaging Configuration**
2. Expand the Email Communications section.
3. In the Vanity Email Configuration section, select **Edit**.
4. Select the option, **Vanity Email**.
5. Enter the vanity email display name. Example: Vision Inc. Careers

   When no vanity display name is configured, candidates will see the recruiter's user name in emails.
6. Enter the vanity email address. Example: careers@visioninc.com
7. Select **Use this for hiring team emails and replies**. By default, emails sent by recruiters display the recruiter's name. When you select this option, emails show the vanity display name.

   Automated emails continue to display the vanity display name regardless of this setting. This setting also doesn't impact emails sent by the email assistant. In Message Center and on the Messages tab, list and detail views continue to display the recruiter's user name as the sender identity.
8. Save your changes.

Note:

- When changing the vanity email, the mailbox part of an email must be the same as the active email messaging provider's user name. For example, if the user name is robert.smith, the email address must be robert.smith@example.com.
- When application-generated messages are sent (such as application confirmation, interview scheduling), they will have the vanity email display name and vanity email, if the notification configuration hasn't been changed.

Configure the Vanity Email

You need to set up a Sender Policy Framework (SPF) policy on your domain to ensure that your outbound email is delivered successfully to the external candidates.

To enable Oracle to send out an email on your behalf, you must set up an SPF policy on your domain as an authentication mechanism. The exact method of setting up an SPF policy varies from one domain provider to another. For example, v=spf1 include:spf_c.oraclecloud.com ~all. As an example, after this SPF policy changes, the candidate will receive an email with the "from email" being "Vision Inc. Careers" <careers@visioninc.com>

You must contact your IT department to add the SPF rule when you want to use the Vanity Email. You must add this rule in your email server to let Oracle's pod email send emails on your behalf.

Set Up Two-Way Email Communications

Enable Vanity Email

You can set up one vanity email for your organization. If your organization has multiple career sites, only one vanity email can be created.

The vanity email address is used to send emails to external candidates, for both one-way and two-way communications.

When two-way communications is enabled, the vanity email is used to send emails to internal candidates as well. When it isn't enabled, internal candidates receive alert notifications.

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    - Functional Area: **Recruiting and Candidate Experience Management**
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4. Select the option, **Vanity Email**.
5. Enter the vanity email display name. Example: Vision Inc. Careers

    When no vanity display name is configured, candidates will see the recruiter’s user name in emails.
6. Enter the vanity email address. Example: careers@visioninc.com

7. Select **Use this for hiring team emails and replies**. By default, emails sent by recruiters display the recruiter's name. When you select this option, emails show the vanity display name.

   Automated emails continue to display the vanity display name regardless of this setting. This setting also doesn't impact emails sent by the email assistant. In Message Center and on the Messages tab, list and detail views continue to display the recruiter's user name as the sender identity.
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Note:

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You must contact your IT department to add the SPF rule when you want to use the Vanity Email. You must add this rule in your email server to let Oracle's pod email send emails on your behalf.

Set Up an Email Messaging Provider

You can set up an email messaging provider that's based on IMAP and uses Basic or Open Authentication. If you're a Microsoft Office 365 user, you can consider Microsoft Graph over IMAP.

Moving to Microsoft Graph from IMAP has these advantages:

- The Microsoft Graph endpoint lets you access Outlook and many other Office 365 services. For more information, see this Microsoft documentation: *Compare Microsoft Graph and Outlook Endpoints*.
- Certificate security support is available for Microsoft Graph.
- Setting up Microsoft Graph also enables Microsoft 365 calendar integration, thereby making the process of scheduling interviews easier.

Note: Only one email messaging provider can be active at a time.

Choose one of these options to set up the email messaging provider and activate it:

- *Configure Microsoft Graph API as Your Email Messaging Provider*
- *Create an Email Messaging Provider Using IMAP*

Configure Microsoft Graph API as Your Email Messaging Provider

Using Microsoft Graph, you can read candidate emails sent to a vanity mailbox that's set up on Microsoft Office 365. This support is provided through open authentication using a client secret or client certificate-based credential.

To configure Microsoft Graph API, complete these prerequisites:

- *Enable Two-Way Communication for Email*
- *Enable Vanity Email*
- *Create the Profile Option to Read Email Messages from a Given Start Date*

Next, configure Microsoft Graph AI as your active email messaging provider by completing the steps below.

Configure Microsoft Azure Cloud

1. Set up a Microsoft Azure application.
2. Set up a vanity email with a mailbox on Microsoft Azure.
3. Set up SPF or DKIM/DMARC on the vanity email domain.
4. Register the vanity email domain on Google Postmaster and Yahoo CFL (Consumer Feedback Loop).
5. Configure Graph API in the Microsoft Azure application and update its access policy to prevent the application from accessing all mailboxes or user profiles.

For detailed instructions on configuring these prerequisites, see the technical brief *Set Up Microsoft 365 Integration for Interview Scheduling and Emails* (Document ID 2664168.1) on My Oracle Support.

For more information on steps 3 and 4 above, see the technical brief, *Implementation of Google/Yahoo Email Sender Guidelines* (Document ID 3053819.1) on My Oracle Support.

Configure Microsoft Graph API

1. In the Setup and Maintenance work area, go to:
    - Offering: **Recruiting and Candidate Experience**
    - Functional Area: **Recruiting and Candidate Experience Management**
    - Task: **Enterprise Recruiting and Candidate Experience Information**
2. Expand the Microsoft Graph Integration section and select **Edit**.
3. Select **Enable Email Integration**.
4. To reuse the Azure application details that have been configured for calendar integration, select the **Use same authentication configuration as calender integration** checkbox. To use a different configuration, complete these fields:
    - **Default User Identifier or Email**: This must be the same as the vanity email. If you enter the default user identifier, it should be associated with the same email as the vanity email.
    - **Application ID**: Enter the client ID used in Azure.
    - **Tenant ID**: Enter the unique identifier used for the Azure Active Directory instance in your organization.
    - **Application Authentication Type**: If you select **Client Secret**, provide the application password. If you select **Certificate**, upload the certificate file and provide the certificate password.
5. Select the **Delete read emails** checkbox if you want the read emails to be automatically deleted. This ensures that the inbox isn't full and all incoming emails are received.
6. Select **Validate Integration** to ensure Graph API is configured correctly.
7. Select **Save**.

Activate Microsoft Graph API as the Email Messaging Provider

1. In the Setup and Maintenance work area, go to:
    - Offering: **Recruiting and Candidate Experience**
    - Functional Area: **Recruiting and Candidate Experience Management**

- Task: **Recruiting Messaging Configuration**

2. Expand the Email Communications section.
3. In the Email Messaging Providers section, you'll see Microsoft Graph Integration added. From the **Actions** menu (shown as three dots) next to it, select **Activate**.

Note that you can't add any other email provider with the same name as Microsoft Graph Integration.

Related Topics

- Configure Email Security

Create an Email Messaging Provider Using IMAP

You can set up an email messaging provider that's based on IMAP and uses Basic or Open Authentication.

Before you start

- Set up SPF or DKIM/DMARC on the vanity email domain.
- Register the vanity email domain on Google Postmaster and Yahoo CFL (Consumer Feedback Loop).

For information on these steps, see the technical brief, *Implementation of Google/Yahoo Email Sender Guidelines* (Document ID 3053819.1) on My Oracle Support.

Here's what to do

1. In the Setup and Maintenance work area, go to:
   - Offering: Recruiting and Candidate Experience
   - Functional Area: Recruiting and Candidate Experience Management
   - Task: Recruiting Messaging Configuration
2. On the Recruiting Messaging Configuration page, in the Email Communications section, select **Add**.
3. Enter a name and description.

   The user name of the active email messaging provider must be the same as the vanity email.
4. The vanity email box will increase in size over time. If you choose to delete emails after they're read, select the **Delete read emails** option.
5. Select an authentication type:
   - Basic Authentication
   - OAuth
6. Based on the authentication type you selected, enter the required info:
   - Basic Authentication: Capture the details from your email service provider: IMAP Server, IMAP Port, User Name, Password. Note: Basic authentication for Office 365 is deprecated. Therefore, use OAuth authentication.
   - OAuth: Email Provider, IMAP Server, IMAP Port, Grant Type, Scope, Tenant ID, Authentication URL, Client ID, Client Secret, User Name. To use the two-way email messaging capabilities with an Office 365 mailbox, you need to register an application in Azure AD and set up a service principal in Exchange to enable the application to access Exchange mailboxes via client credentials flow with the IMAP protocol. For details, see the technical brief Set Up OAuth for Office 365 Users (ID *2936718.1*) available on My Oracle Support.
7. Select **Check Connection** to make sure that the configuration is properly done.
8. Select **Save and Close**.
9. On the Recruiting Messaging Configuration page, in the Email Messaging Providers list, find the provider you added and set it to **Active**.

Enable Two-Way Communication for Email

When you enable two-way communication for email, you can choose to enable it for external candidates, internal candidates, or both.

1. In the Setup and Maintenance work area, go to:
    - Offering: Recruiting and Candidate Experience
    - Functional Area: Recruiting and Candidate Experience Management
    - Task: Recruiting Messaging Configuration
2. On the Recruiting Messaging Configuration page, select these options:
    - **Enable Two-Way Email Communications with External Candidates** to enable two-way messaging with external candidates.
    - **Enable Two-Way Email Communications with Internal Candidates** to enable two-way messaging with internal candidates.

    > **Note:** When you enable two-way email communications for internal candidates, email notifications related to recruiting will no longer appear in the worklist notification on the global header.

Create the Profile Option to Read Email Messages from a Given Start Date

You need to create a profile option called IRC_2_WAY_EMAIL_LAST_SYNC_TIME to read email messages from a given start date. It represents the last time the email messages are read and processed by Recruiting.

1. In the Setup and Maintenance work area, select the **Tasks** icon.
2. Select **Search**.
3. On the Search page, search for the task **Manage Profile Options**.
4. Select the task name.
5. On the Manage Profile Options page, select the **Create** icon.
6. On the Create Profile Option page, create the profile option by entering these values:
    - Profile Option Code: IRC_2_WAY_EMAIL_LAST_SYNC_TIME
    - Profile Display Name: 2-Way Email Last Sync Time
    - Application: Recruiting
    - Module: Recruiting Common
    - Description: Define the last sync time for the two-way email communication feature.
    - Start Date: Today's date
7. Select **Save and Close**.
8. You're back on the Manage Profile Options page and the profile option **IRC_2_WAY_EMAIL_LAST_SYNC_TIME** is displayed. You need to enable the profile option at the Site level.
9. On the Manage Profile Options page, go to the **Profile Option Levels** section.
10. Set the profile option to be enabled and updatable at the Site level.
11. Select **Save and Close**.
12. You need to set profile value for the profile option IRC_2_WAY_EMAIL_LAST_SYNC_TIME to define from when the email messages are to be read.
13. In the Setup and Maintenance work area, select the **Tasks** icon.
14. Select **Search**.

15. Select the **Search** icon.
16. On the Search page, search for the task **Manage Administrator Profile Values**.
17. Select the task name.
18. On the Manage Administrator Profile Values page, search for the profile option code **IRC_2_WAY_EMAIL_LAST_SYNC_TIME**.
19. Set the profile value to yesterday's date, that is **Current date - 1**. Use the UTC date and time in standard ISO 8601 format: YYYY-MM-DD HH:MM:SS.

> **Note:** If you don't set a value for this profile option, it'll be set to a default value of 7 days before the current date. If you haven't created a profile option, then the default value can't be set and emails won't be processed.

20. Select **Save and Close**.

Configure the No-Reply Email

It's recommended to configure the no-reply mailbox for automated notifications so that candidate replies aren't tracked. This is applicable for two-way communications with internal and external candidates.

When you send an email that's based on a content library template, the email is sent either through the no-reply email or vanity email, depending on certain factors. Before the 24D upgrade, the **Capture Message** checkbox in the content library template decided whether the notification was sent through the no-reply email or vanity email. After the upgrade, the following notifications are always sent through the no-reply email, even if they have the **Capture Message** checkbox enabled.

Notification Category Code	Notification Category Name
ORA_CAMPAIGN_OPT_IN_STATEMENT	Campaign Opt In Statement
ORA_CANDIDATE_CONFIRMATION	Social Campaigns Confirmation Notification
ORA_CAND_VERIFY_NOTIF	Candidate Verification Notification
ORA_EVENT_CANC_NOTIFICATION	Event Canceled Notification
ORA_EVENT_THANKYOU_NOTIF	Event Thank You Notification
ORA_EVENT_UPDATE_NOTIFICATION	Event Update Notification
ORA_JA_CONFIRMATION	Job Application Confirmation Notification
ORA_JOB_ALERT	Job Alert Notification
ORA_OM_CAND_INVITED	Opportunity Marketplace Invite Candidate For Gig Notification
ORA_OM_GIG_ASSIGNED	Opportunity Marketplace Assigned Gig Notification
ORA_OM_GIG_CANCELED	Opportunity Marketplace Gig Canceled
ORA_OM_GIG_NOT_APPROVED	Opportunity Marketplace Gig Not Approved
ORA_OM_GIG_NOT_SELECTED	Opportunity Marketplace Gig Not Selected
ORA_OM_OPPORTUNITY_ALERT	Marketplace Opportunity Notification

Notification Category Code	Notification Category Name
ORA_TALENT_COMMUNITY_CONFIRM	Talent Community Confirmation Notification

Notifications other than the above will be sent through the vanity email, if the **Capture Message** checkbox is enabled. They will be sent through the no-reply email, if this checkbox is disabled. However, for some notifications that have this checkbox enabled, you can override it and send them through the no-reply email.

1. In the Setup and Maintenance work area, go to:
    - Offering: **Recruiting and Candidate Experience**
    - Functional Area: **Recruiting and Candidate Experience Management**
    - Task: **Recruiting Messaging Configuration**
2. Expand the Email Communications section.
3. In the Vanity Email Configuration section, select **Edit**.
4. Enter the no-reply email address.
5. In the Send Notifications Using No-Reply Email section, select the notifications that you want to send using the no-reply email. Even if the Capture Message feature is enabled for these notification categories, emails will be sent only using the no-reply email once you select them here.

   By default, all these notifications are unselected. An unselected notification is sent through the vanity email, only if it has the Capture Message feature enabled.
6. Select **Save**.

Related Topics

- What happens when you send a candidate email that's not based on a content library template?

Set Up a Work Email for Two-Way Email Communication

For two-way email communication to work, the work email must be set as the primary email in the employee's profile in Person Management. This feature won't work as intended if any other email, for example, home email, is set as the primary email. An employee could be any worker who interacts with a candidate.

1. Go to **My Client Groups** > **Person Management** and search for the employee.
2. From the employee's profile photo, select **More Information** > **Personal and Employment** > **Person**.
3. In the Communication Methods section, select **Email Details** from the **Edit** menu.
4. Set an existing work email address as primary, or add a work email address, if it doesn't already exist.

Run the Scheduled Process for Inbound Messages

You need to run the Process Recruiting Inbound Message scheduled process with a 15-minute frequency to see candidates' SMS and email replies.

1. From the navigation menu, go to **Tools** > **Scheduled Processes**
2. On the Overview page, select **Schedule New Process**.
3. On the Schedule New Process page, select the menu and select **Search**.
4. Search for the **Process Recruiting Inbound Message** process.
5. Select **OK**.
6. On the Process Details page, submit the process.

Set Up the Email Assistant

Prerequisites for AI Agent Studio

The prerequisites for using AI Agent Studio are:

- Your environment must have the appropriate services for Oracle Applications Platform deployed. For more information, see *FAQ2521 on My Oracle Cloud Support*.
- Enable permission groups for the appropriate roles. See *Access Requirements for AI Agent Studio*.
- The agents you can view depend on the roles and privileges assigned to you. To access an agent or agent workflow, your role must be explicitly granted access to it by an AI Studio Administrator. See *How can I give users access to AI agents* and *Access Requirements for AI Agent Studio*.

Access Requirements for the Recruiting Inbox Response Agent

The Recruiting Inbox Response Agent is secured by the following Spectra Authorization Service (SAS) role: ORA_HCM_IRC_RECRUITING_SCHEDULED_WF_AGENT_ACCESS.

Access requirements for the Recruiting Inbox Screening Agent

To schedule the agent, you need the ORA_HCM_IRC_RECRUITING_SCHEDULED_WF_AGENT_ACCESS privilege.

By default, recruiting manager users have the View Inappropriate Message Content (IRC_VIEW_INAPPROPRIATE_MESSAGE_CONTENT_PRIV) privilege. This privilege allows users to view unmasked message content.

Configure the Recruiting Email Assistant Template

Configure the Recruiting Email Assistant Template to update the email header and signature as needed. You can also define the schedule for running the email assistant.

Before you start

To schedule the agent, the administrator needs to have the ORA_HCM_IRC_RECRUITING_SCHEDULED_WF_AGENT_ACCESS privilege.

Here's what to do

1. Go to **Navigator** > **Tools** > **AI Agent Studio**.
2. Search for the **Recruiting Email Assistant Template**.
3. Select **Copy Template**.
4. Add a suffix to the template. This will get appended to the template name.
5. You'll see an editable version of this template in the Agent Designer, with the child workflows displayed on the right pane
6. Edit the child workflow **EmailMessagingAssistantWorkflowNode** using the three-dot menu.
7. On the drawer panel, edit the header and signature in the Input Variables section:
    - EmailReplySignature
    - EmailReplyHeader
8. Apply your changes.

9. Select **Update** on the drawer panel.
10. On the Agent Designer page, select the **Agent Team Settings** icon on the menu header.

    Here, you can define the schedule for running this agent.

11. On the **Triggers** tab of the drawer panel, add a schedule.
12. Select the schedule type.

    If you select **Interval**, you can specify how often you want to run this agent, for example every 5 minutes. If you select **Recurrence**, you can schedule this as a one-time run or a repeating run.

    > **Note:** It's recommended to run the agent for at least every 5 minutes. All times need to be entered in the 24-hour format in UTC time zone. The end date and end time are optional.

13. Select **Update** in the Schedule section.
14. Select **Update** on the drawer panel.
15. Review the agent details in the Agent Designer and publish it.

    The agent will start running from the start time you specified in the Schedule section.

What to do next

To change the schedule, signature or header, search for the copy of the template you created on the **Agent Teams** tab and edit it.

If you're upgrading from an earlier version of the Recruiting Email Assistant Template, delete the existing schedule, create a new copy of the template, and schedule the new copy. Running the new template executes both the Recruiting Inbox Response Agent and the Recruiting Inbox Document Processing Agent in sequence. We recommend scheduling the template to run every five minutes.

To stop running the agent, delete the schedule and republish the agent.

Upload Documents to the Recruiting Knowledge Factory Tool

Upload your organization's policy and process documents to the **Recruiting Knowledge Factory** tool. This enables the **Recruiting Inbox Response Agent** (email assistant) to refer to them when answering candidate emails.

1. Go to **Navigator** > **Tools** > **AI Agent Studio**.
2. On the **Tools** tab, search for the **Recruiting Knowledge Factory** tool.
3. To edit the tool, select the pencil icon in the **Actions** column.
4. In the **Documents** section, add the document that you want the email assistant to refer when answering candidate questions.
5. Enter a name for the document and set the document's status to **Ready to publish**.
6. Upload the document and save your changes.
7. Repeat steps 4 to 6 for each document that you want to upload.
8. Save your changes to the tool.

What to do next

Run the **Process Agent Documents** scheduled process. When this job completes, the documents will be in **Published** status and the email assistant can use them to respond to candidate emails.

Enable the Recruiting Inbox Response Agent

Enable the Recruiting Inbox Response Agent (email assistant) in Recruiting to process and respond to candidate emails. It doesn't process email attachments. If you've enabled the Recruiting Inbox Document Processing Agent, the Inbox Response Agent runs first, followed by the Inbox Document Processing Agent.

1. In the Setup and Maintenance work area, go to:
    - **Offering:** Recruiting and Candidate Experience
    - **Functional Area:** Recruiting and Candidate Experience Management
    - **Task:** Recruiting Messaging Configuration
2. Expand the Email Communications section.
3. In the Email Assistant section, select the checkbox, **Enable the inbox response agent**.

Enable the Recruiting Inbox Document Processing Agent

The Recruiting Inbox Document Processing Agent is a child workflow of the Recruiting Email Assistant Template workflow in Oracle AI Agent Studio. This agent automatically processes attachments received from candidate emails, categorizes them into appropriate document types, and saves them to the candidate profile or job application depending on the email context. It runs independently of the Recruiting Inbox Response Agent.

The agent team code for this agent is ORA_HCM_IRC_EMAIL_ATTACHMENT_PROCESSING_AGENT.

Before you start

- *Enable Email Attachments*
- Configure and activate the required document types using the **Enterprise Recruiting and Candidate Experience Information** task in Setup and Maintenance.

Here's what to do

1. In the Setup and Maintenance work area, go to:
    - **Offering:** Recruiting and Candidate Experience
    - **Functional Area:** Recruiting and Candidate Experience Management
    - **Task:** Recruiting Messaging Configuration
2. Expand the Email Communications section.
3. In the Email Assistant section, select **Enable the inbox document processing agent**.

Configure Profile Options for the Email Assistant

Configure the following profile options for the Recruiting Inbox Response Agent and the Recruiting Inbox Document Processing Agent:

Feature	Profile Option	Profile Value
Number of minutes to disable the **Send Reply** action while the email assistant is processing the email.	ORA_IRC_2W_EMAIL_AGENT_USERACTION_DISABLE_DURATION	Enter the number of minutes. The default value is 15 minutes. The **Send Reply** button will be enabled once this time elapses. If you set this value less than the auto-skip time-out value, then the email will be available for both the

Feature	Profile Option	Profile Value
		recruiter and email assistant to respond because the Send Reply button will be enabled even while the agent is processing the email.
Number of minutes to wait for the email assistant to read and process the email. This profile option isn't delivered by default. Create it and then set the desired value.	IRC_2W_AGENT_AUTO_SKIP_TIMEOUT	Enter the number of minutes. The default value is 15 minutes. If the agent can't reply within this time, the email is available for the recruiter to respond.
Maximum number of email assistant responses that can be sent across all candidates in a day.	ORA_IRC_2W_EMAIL_AGENT_SYSTEM_THROTTLE_LIMIT	The default value is 1000.
Maximum number of email assistant responses that can be sent to a single candidate in a day.	ORA_IRC_2W_EMAIL_AGENT_CAND_THROTTLE_LIMIT	The default value is 5.
Maximum number of email attachments that the agent can process across all candidates in a day.	ORA_IRC_2W_EMAIL_ATTCHPROCESS_AGENT_SYSTEM_THROTTLE_LIMIT	5000
Maximum number of email attachments that the agent can process for a single candidate in a day.	ORA_IRC_2W_EMAIL_ATTCHPROCESS_AGENT_CAND_THROTTLE_LIMIT	10

Related Topics

- Create and Edit Profile Options

Set Up the Recruiting Inbox Screening Agent

Schedule the Recruiting Inbox Screening Agent

The Recruiting Inbox Screening Agent is a delivered workflow agent that you can't configure. To run it on a schedule, create a duplicate of its parent workflow, Recruiting Inbox Screening Agent Scheduler.

To schedule the agent, you need the ORA_HCM_IRC_RECRUITING_SCHEDULED_WF_AGENT_ACCESS privilege.

1. Go to **Navigator** > **Tools** > **AI Agent Studio**.
2. On the **Workflows** tab, search for **Recruiting Inbox Screening Agent Scheduler**.
3. Create a duplicate of the workflow.
4. Select the **Settings** icon.
5. Select **Triggers** > **Schedule**.
6. Add a schedule as required, and select **Interval** as the schedule type.

   We recommend that you run the agent at least every 5 minutes.

Enable the Recruiting Inbox Screening Agent

Enable the Recruiting Inbox Screening Agent to identify inappropriate content in inbound candidate emails, SMS messages, and WhatsApp messages. The agent masks inappropriate message text for users without the required privilege and can add a label to candidates whose messages contain inappropriate content.

1. In the Setup and Maintenance work area, go to:
    - **Offering:** Recruiting and Candidate Experience
    - **Functional Area:** Recruiting and Candidate Experience Management
    - **Task:** Recruiting Messaging Configuration
2. In the Agent Settings section, enable the inbox screening agent.
3. Select the candidate label to apply to candidates who send messages containing inappropriate content.

   To define and manage candidate labels, go to **Recruiting and Candidate Experience** > **Recruiting and Candidate Experience Management**, and use the **Manage Recruiting Labels** task.
4. Save your changes.

   If you disable the inbox screening agent later, messages identified as inappropriate until then retain their tag. The agent won't screen new messages.

Configure Reply Availability for Inappropriate Messages

By default, the Reply button is available for messages identified as containing inappropriate content. To hide the button, use the **enableReplyForOffensiveMessages** page property in Visual Builder Studio.

This property separately controls the Reply button for these page categories:

- Message Center
- Candidate, event, pool, and prospect contexts
- Job application details

Optional Configuration for Email

Enable Candidates to Unsubscribe from Marketing Emails

You can classify certain messages as Marketing and provide an option for external candidates to unsubscribe from them. It's applicable only to emails or certain actions that are taken on multiple candidates at once, from candidate list views in candidate search, job applications, candidate pools, or prospects pages. When a candidate unsubscribes from these messages, they'll no longer receive them. This feature isn't applicable to internal candidates.

To classify a message as Marketing, use the Recruiting Messaging Configuration task in Setup and Maintenance and select the notification templates that have content that can be considered as marketing. The following notification templates are available to classify as Marketing.

Content Library Templates Available to Classify as Marketing

User Action	Available Content Library Templates	Outcome When Candidates Subscribe to Marketing Notifications
Sending bulk messages to more than one candidate from candidate list views through the **Send Message** action.	• Prospect Candidate Notification • Candidate Pool Member Notification • Candidate Profile Notification • Event Pool Member Notification In addition to the above, any user-defined message (which isn't based on a template) can also be marked as marketing.	These bulk messages are sent only to those candidates who have subscribed to them. Unsubscribed candidates won't receive them.
Adding multiple candidates as prospects to a requisition from a candidate list, candidate pools list, events list, or job applications list through the Add to Requisition action.	Send Invite Notification	Candidates who have subscribed are added as prospects to the requisition and this notification is sent to them. Unsubscribed candidates won't be added as prospects to a requisition and won't receive the notification.
Adding multiple candidates to an event from a candidate list through the Add to Event action.	Send Event Invite Notification	Candidates who have subscribed are added to the event and this notification is sent to them. Unsubscribed candidates won't be added to the event and won't receive the notification.
Adding a requisition to a candidate pool (available in Redwood pages only).	Candidate Pool Job Notification	This notification is sent to all the subscribed candidates in the candidate pool. Unsubscribed candidates won't receive it.

Note: If you compose a message for a single candidate (from a candidate's profile page) and it contains one of the above marketing notifications, or if you perform any of the above actions on a single candidate, that candidate will continue to receive the marketing notification or get added to a requisition or to an event, even if they earlier unsubscribed from that notification sent as part of a bulk message.

The marketing emails will include an unsubscribe option in the header along with an unsubscribe link at the end of the email body, which is visible to candidates. However, when a recruiter previews this email, they can't see the unsubscribe link or in the sent email on the **Messages** tab.

The unsubscribe link is available through a new predefined content library item, **Marketing Emails Unsubscribe Notification**. This content item provides two tokens, `HREF`and `UnsubscribeLinkURL`, which enables you to add the unsubscribe link. Currently, it has the following predefined text:

```
<a ${href}="${UnsubscribeLinkURL}"
 target="_blank">Unsubscribe from these emails.
```

You can create another version of this content item to create your own unsubscribe text.

Here's how you classify a notification as marketing:

1. In the Setup and Maintenance work area, go to:
    - **Offering:** Recruiting and Candidate Experience
    - **Functional Area:** Recruiting and Candidate Experience Management
    - **Task:** Recruiting Messaging Configuration
2. Scroll down and expand the Marketing Email Notifications section.
3. Select **Edit**.

4. Select the notification templates that you want to classify as marketing. Note that some of these are selected by default, which you can change as per your business needs.
5. Select **Save**.

For more information on email sender guidelines, see the technical brief, *Implementation of Google/Yahoo Email Sender Guidelines* (Document ID 3053819.1) on My Oracle Support.

Configure Notifications for Candidate Replies to Automated Emails

If an auto-generated email is sent through the vanity email and candidates reply to them, hiring team members can be notified using this feature. You can configure who from the hiring team should be notified.

These notifications are received in the hiring team member's work mailbox. The candidates' replies are also displayed in the **Messages** tab, only if the **Capture Message** checkbox is enabled for the auto-generated email.
Using this configuration, you can't notify hiring team members when candidates reply to:

- Auto-generated emails that are sent from a no-reply email. Hiring team members need to access the no-reply mailbox to see the candidate replies.
- Any emails that aren't auto-generated (that is, emails composed manually by hiring team members). Hiring team members need to access the **Messages** tab to see the candidate replies.

1. In the Setup and Maintenance work area, go to:
    - Setup: **Recruiting and Candidate Experience**
    - Functional Area: **Recruiting and Candidate Experience Management**
    - Task: **Recruiting Messaging Configuration**
2. In the Hiring Team Notification for Replies to Automated Emails section, select **Edit**.
3. Select the respective check boxes to notify either recruiters or hiring managers or both. By default, both check boxes are selected. If the email was sent in the context of a candidate pool, the pool owners are also notified.

   Let's say you select both hiring managers and recruiters to receive the email replies. After the candidate sends their first reply, let's say you change the configuration to notify only hiring managers and not recruiters. When the candidate sends subsequent replies to that same email thread, this configuration change won't impact the earlier recipients' list. Both hiring manages and recruiters will continue to receive the replies for the existing conversations.

Enable Alternate Email for Internal Candidate Communications

You can enable the use of an alternate email address when internal candidates without a work email apply for a job.

Internal candidates without a work email can provide an alternate email address to receive all recruiting notifications and employee communications. They can enter one alternate email address per job application. They can enter a different email address if they choose to. Recruiters and hiring managers can see that alternate email address in the Personal Info section of the candidate profile, in the candidate job application, in the prospect record, and in the candidate pool member record.

This feature applies to employees and internal contingent workers who don't have a work email. All the communication is captured in the Messages tab.

Here's what to do

1. Enable the Internal Candidate Alternate Email Profile Option
2. Configure the Use of the Alternate Email Address in the Internal Application Flow
3. Add the Alternate Email Token to the Notification Gateway Alert

Enable the Internal Candidate Alternate Email Profile Option

You first need to configure the use of an alternate email address by enabling the profile option ORA_IRC_INTERNAL_CAND_ALT_EMAIL_ENABLED at the Site level, using the Manage Administrator Profile Values task.

1. In the Setup and Maintenance work area, select the **Tasks** icon.
2. Select **Search**.
3. Search for the task **Manage Administrator Profile Values**.
4. Select the task name.
5. On the Manage Administrator Profile Values page, search for the profile option code **ORA_IRC_INTERNAL_CAND_ALT_EMAIL_ENABLED**.
6. Set the profile value at the Site level to **Y**.
7. Select **Save and Close**.

Configure the Use of the Alternate Email Address in the Internal Application Flow

You now need to configure the use of the alternate email address in the internal application flow.

1. Activate a sandbox and page editing at the Site layer in **Settings and Actions Menu > Edit Pages > Activate a sandbox**.
2. On your Home page, go to **My Client Groups > HCM Experience Design Studio**.
3. Select the **Transaction Design Studio** tab.
4. Select the action **Recruiting – Apply to Internal Jobs**.
5. Select **Add** to create a rule.
6. In the Basic Details section, enter a name and a description for the rule.
7. In the Show or Hide Regions section, set **Alternate Email** to **Visible**.
8. Select **Save and Close**.

Add the Alternate Email Token to the Notification Gateway Alert

You need to add the Alternate Email token to the Notification Gateway alert to send emails to an alternate email address. This will ensure that the Notification Gateway will use the alternate candidate email when the feature is enabled.

1. In the Navigator menu, go to **Tools > Alerts Composer**.
2. Search for and open the **IRC_Candidate_Notifications_Gateway** alert.
3. In the Edit menu, select **Manage Recipients and Message**.
4. Select **Add Recipient**.
5. For the communication method, select **Mail**.
6. For the expression, add the token ${AlternateCandidateEmail}.
7. Select **Apply**.
8. Save the alert configuration.

Enable Email Attachments

When you use the messaging feature in the Redwood experience for candidate details pages, you can upload attachments to outgoing emails and receive incoming emails with attachments. Enabling incoming email attachments is also required before recruiters can manually save incoming candidate email attachments to a candidate profile or job application.

To allow incoming emails with attachments:

1. In the Setup and Maintenance work area, go to:
    - Offering: Recruiting and Candidate Experience
    - Functional Area: Recruiting and Candidate Experience Management
    - Task: Recruiting Messaging Configuration
2. In the Email Messaging Providers section, check whether two-way communications is enabled either for internal or external candidates, or for both.
3. Select the checkbox, **Process email attachments from candidates**.

Specify the Size Limit for Emails

You can specify the size limit for incoming and outgoing emails, including their attachments.

1. In the Setup and Maintenance work area, go to:
    - Offering: Recruiting and Candidate Experience
    - Functional Area: Recruiting and Candidate Experience Management
    - Task: Recruiting Messaging Configuration
2. Select **Edit** on the Additional Email Settings page.
3. Specify the maximum size limit of an outgoing or incoming email, which includes attachments and the body of the message. You can decide this limit based on the size of the vanity mailbox. The default value is 20 MB.

    > **Note:** Even if incoming messages don't have attachments, they will be rejected if the size of the message body exceeds the limit specified here.

4. Select **Save**.

Manage File Types for Email Attachments

As an administrator, you can define which files types are allowed as attachments in incoming emails. The allowed list of file types is defined in the ORA_IRC_MISC_ATTACH_FILE_TYPES profile option. Unsupported file types are defined in the ORA_IRC_MISC_ATTACH_UNSUPPORTED_FILE_TYPES profile option.

The list of allowed file types includes these files: .txt, .rtf, .doc, .docx, .pdf, .htm, .html, .jpeg, .png, .zip, .HEIC, .pptx, .msg, .jpg, .pdf, and .odt. If you haven't defined the allowed file types so far, these predefined values will be used.

Both the allowed and unsupported file types are also displayed as part of the Enterprise Recruiting and Candidate Experience Information task, in the section, Attachments from Candidates.

Related Topics

- How do I enable a profile option?

Using Design Templates for Emails

The feature of applying design templates to one-to-one emails is enabled by default, when you've enabled Redwood.

To disable it, you need to create the profile option, IRC_REDWOOD_COMPOSE_EMAIL_DISABLE_BRANDING and set it to **Y**.

Before you can associate design templates to emails, you must:

1. Create the design templates using the HTML Email templates task in Setup and Maintenance. These templates can be of type Internal, Global, or AdHoc.
2. Make the templates active.

Emails based on content library templates

When creating a content item based on the following content library categories, associate the AdHoc design template with it:

- Candidate Profile Notification - ORA_PROFILE_EMAIL_TEMPLATE
- Job Application Notification - ORA_JA_EMAIL_TEMPLATE
- Prospect Candidate Notification - ORA_PROSPECT_EMAIL_TEMPLATE
- Candidate Pool Member Notification - ORA_POOL_EMAIL_TEMPLATE
- Event Pool Member Notification - ORA_EVENT_POOL_NOTIFICATION_TEMPLATE

Free-form emails

Because free-form emails aren't associated with a content library item, the global design template is applied, if available.

Language-specific design templates

To ensure that a language-specific design template is included in the email:

1. Create a design template in the desired language and make it active, using the HTML Email Templates task.
2. Ensure that there's a translated version of the content library item with which you've associated the language-specific design template.

Related Topics

- HTML Email Templates
- Content Item Versions
- Configure a Career Site

Manage Document Types for Saving Email Attachments

When recruiters manually save an incoming email attachment, they select a document type to categorize it. A set of default document types is available, such as Resume, Passport, and Driving License. If no document type is selected, the attachment is categorized as Miscellaneous.

You can create additional document types or make existing document types active.

> **Note:** Document types categorize saved attachments. They're different from the allowed file types that control which files candidates can send as email attachments.

1. In the Setup and Maintenance work area, go to:
    - Offering: Recruiting and Candidate Experience
    - Functional Area: Recruiting and Candidate Experience Management
    - Task: Enterprise Recruiting and Candidate Experience Information
    - Section: Document Types
2. Create or activate the document types that recruiters can select when saving incoming email attachments.
3. Save your changes.

WhatsApp Setup

Workflow to Set Up Two-Way WhatsApp Communications

WhatsApp is available only when the Redwood experience is enabled in Recruiting Booster. Here are the steps to set up two-way WhatsApp communications, which enables the hiring team to send and receive WhatsApp messages to and from external candidates.

Required Tasks

1. *Enable Redwood for Messaging in Recruiting*
2. *Opt in to Recruiting Booster*
3. *Add a WhatsApp Messaging Provider Account*
4. *Test Outbound WhatsApp Message*
5. *Set Limits for Outbound Messages and Enable WhatsApp Communications*
6. *Configure List of Countries to Send WhatsApp Messages*
7. *Set Up WhatsApp Templates*
    a. *Create WhatsApp Templates*
    b. *Add Template Translations*
    c. *Send WhatsApp Templates for Approval*
    d. *Associate WhatsApp Templates with Content Library Items*
    e. *Get WhatsApp Template Statuses*
8. *Configure the Profile Option to Read WhatsApp from a Given Start Date*
9. *Run the Scheduled Process for Inbound Messages*

Optional Tasks

You can perform these tasks as required:

- *Enable AI Assist for Compose and Reply Actions*
- *Manage WhatsApp Templates*
    - *Search for WhatsApp Templates*
    - *Edit WhatsApp Templates*
    - *Deactivate WhatsApp Templates*
- *Block Phone Numbers or Phone Number Patterns*
- *Extensibility for WhatsApp*
- *Export and Import WhatsApp Configuration Data*
- *Enable Candidates to Opt Out of WhatsApp Communications*

Related Topics

- Profile Options for Messaging

Set Up for Two-Way WhatsApp Communications

Add a WhatsApp Messaging Provider Account

You need to add and activate a messaging provider account that can be used for WhatsApp communications. It's also required to have a WhatsApp Business Account (WABA) set up on the messaging service provider platform. This business account could be procured through the messaging service provider or directly from Meta.

1. In the Setup and Maintenance work area, go to:
    - Offering: **Recruiting and Candidate Experience**
    - Functional Area: **Recruiting and Candidate Experience Management**
    - Task: **Recruiting Messaging Configuration**
2. In the WhatsApp Messaging Providers section, select **Add**.
3. Enter a name and description.
4. Select the name of the provider in the **Provider** list. Currently, Twilio and Syniverse are supported.
5. The message length limit is preset to 4096 characters for Syniverse and 1600 characters for Twilio.
6. Enter info related to the messaging provider account in the remaining sections. For details, see the document *Adding a WhatsApp Messaging Service Provider* on My Oracle Support (Document ID 3101136.1).

    > **Note:** For processing outbound messages, the messaging provider's API is expected to return the response in JSON format. To ensure smooth processing of these messages, we recommend that you include the Accept header in the Headers section and specify its value as application/json.

7. Select **Save and Close**.

What to do next

Test the outbound WhatsApp message.

Related Topics

- Webhook Configuration for a WhatsApp Messaging Provider

Test Outbound WhatsApp Message

You need to test the WhatsApp messaging provider account to make sure that the configuration is properly done. This step is done to ensure that messages to candidates are sent successfully.

1. In the Setup and Maintenance work area, go to:
    - Offering: **Recruiting and Candidate Experience**
    - Functional Area: **Recruiting and Candidate Experience Management**
    - Task: **Recruiting Messaging Configuration**
2. In the WhatsApp Messaging Providers section, select the name of the active account.
3. Select **Test Outbound Message**.
4. Send a test WhatsApp message from your phone number (or any recipient's phone number) to the provider number that's shown on the page. If the message fails to be sent on WhatsApp, it could be due to an issue with your internet connection, the WhatsApp messaging service, or the messaging provider's service. Complete the steps below within 24 hours of completing this step.

5. Select the checkbox, **I've sent a test message to the provider's number**.
6. In the **Phone Number** field, enter your phone number or the same recipient's phone number that you used for sending the test message in step 4. If the phone numbers are different, the message will fail to be sent from the messaging provider to WhatsApp.
7. In the **WhatsApp Message** field, enter another test message and select **Send**. If it's sent successfully, the recipient's phone number will receive this test message. You can also confirm this by checking the request and response details in the Sent Message Info section. A status code of 200 in the Response Details section indicates that the message is successfully sent to the messaging provider. Any other status code indicates a failed message.

   > **Note:** If the phone number used in step 4 is different from the phone number used in step 6, you'll still see a status code of 200. However, if you check the status of the response ID number in the messaging provider's developer's console, you'll see that the message has failed because the messaging provider wasn't able to send the message to the recipient's phone number.

8. Go back to the WhatsApp Messaging Providers list, and set the status of the account you added to **Active**.

   > **Note:** Only one account can be active at a time. You can delete and deactivate other accounts as required.

Set Limits for Outbound Messages and Enable WhatsApp Communications

Setting limits for outbound WhatsApp messages is useful to limit the volume of outbound WhatsApp messages sent using third-party services like Syniverse. It also helps limit the cost of usage-based service because these messages are sent using a WhatsApp business account.

Before you start

- You need to have a WhatsApp messaging provider account in Active status.
- You also need to set limits for outbound WhatsApp messages sent from Recruiting.

Here's what to do

1. In the Setup and Maintenance work area, go to:
   - Offering: Recruiting and Candidate Experience
   - Functional Area: Recruiting and Candidate Experience Management
   - Task: Recruiting Messaging Configuration
2. In the Limit for SMS and WhatsApp Messages section, select **Edit**.
3. Configure all these options in the WhatsApp Limits column:
   - **Maximum number of messages that can be sent in a day:** This defines the total number of WhatsApp messages that can be sent from Recruiting in a day across all candidates by different hiring team members. This is called the system hard limit. All WhatsApp messages that are sent after this limit is reached are blocked for that day. When this limit is reached, a notification is sent to the administrator. Blocked messages are never attempted to be sent automatically to the candidate.
   - **Maximum number of messages that can be sent per candidate in a day:** This defines the number of WhatsApp messages that can be sent to a single candidate in a day by different hiring team members. This is also called as the candidate message limit. All WhatsApp messages that are sent after this limit is reached are blocked for that day. Blocked messages are never attempted to be sent automatically to the candidate.
   - **Number of messages that triggers a warning notification:** This defines the number of WhatsApp messages that can be sent across Recruiting. This is called the system soft limit. After this number is

reached, a warning email is sent to the administrator. This number should be less than the maximum limit that can be sent in a day.

Note:

- UTC time zone is considered when counting the limits.
- The system hard limit and candidate message limit are reset to zero at the start of UTC day, at 00:00:00 hours. When the limits are reset, you can send new WhatsApp messages the next day.
- Candidates will be informed through the career site when the system hard limit or the candidate message limit is reached for the day.
- Recruiters can't send messages manually when the system hard limit or the candidate message limit is reached. If automated messages are initiated, they go to the Blocked status.

4. Select **Save**.
5. On the Recruiting Messaging Configuration page, in the SMS Messaging Providers section, select the option **Enable WhatsApp Communications**.

Configure List of Countries to Send WhatsApp Messages

Using the Recruiting Messaging Configuration task, you can define the list of allowed countries that can receive WhatsApp messages. This list will be initially empty. You need to add the countries to which you want to send messages.

If you try to send a WhatsApp message to a country that's not in this allowed list, it'll be blocked. You can see the **Blocked** status against the message in the list view. When you open a blocked message, you can see the reason for the block. An error message is also displayed to candidates on the career site when they provide a number that's not in this allowed list.

1. In the Setup and Maintenance work area, go to:
   - **Offering**: Recruiting and Candidate Experience
   - **Functional Area**: Recruiting and Candidate Experience Management
   - **Task**: Recruiting Messaging Configuration
2. In the Allowed List of Countries for WhatsApp section, select **Edit**.
3. Select the **Create** icon (displayed as +).
4. Select the country from the list that appears.

   Note: When you select a country that has the same country code as another country, both countries will be added to this list. For example, when you select United States, Canada will also be added because it has the same country code.

5. Select **Save**.

Set Up WhatsApp Templates

WhatsApp templates enable recruiters to have structured and preapproved conversations with candidates. After creating WhatsApp templates, you need to send them for approval to Meta, which ensures that the templates are in compliance with Meta guidelines for WhatsApp messaging.

You create and manage templates using the WhatsApp Notification Template Library task in Setup and Maintenance. You can also add translations to the templates. These translations also need to be approved by Meta.

A WhatsApp template can be in one of these statuses:

- Draft – As soon as a template is created, it's in this status before it's sent for approval to Meta.

- Pending Approval – Status when a template is sent for approval to Meta.
- Approved – Status when Meta approves the template.
- Rejected – Status when Meta rejects the template.
- Suspended – Meta continuously monitors the template's contents based on feedback from users. If they get repeated negative feedback, it could lead to the template being suspended.
- Inactive – Status when you manually deactivate templates when they're no longer needed.

A WhatsApp template is considered active if it's in any status except the Inactive status. As per Meta guidelines, the maximum number of active templates that can be associated with a WhatsApp Business Account account is 6000. For the latest updates on this limit, see Related Topics below.

Each WhatsApp template must belong to one of these categories:

- Marketing: Marketing templates are designed to achieve organization's goals of generating awareness or driving sales.
- Utility: Utility templates enable you to follow up on user actions or requests. For example, if a candidate applies to a job, you might want to send an acknowledgment message. For this purpose, you can create a template based on the Utility category.
- Authentication: Authentication templates enable you to verify a user's identity.

To access the WhatsApp Notification Template Library, you need the privilege IRC_MANAGE_RECRUITING_CONTENT_LIBRARY_PRIV.

Related Topics

- Meta guidelines for template categories
- Meta templates

Create WhatsApp Templates

You can create WhatsApp templates from scratch or by copying SMS content library templates from the Recruiting Content Library. When a template is created from scratch, you need to provide the corresponding translations by editing the template.

When you create WhatsApp templates by copying SMS content templates, all existing content library items that are used for messaging purposes and have SMS content in them will be considered. If a content library item has any translations, WhatsApp templates will be created in each of those languages. The WhatsApp templates are also automatically associated with the content library items from which they were copied.

Copying SMS content templates to create WhatsApp templates should be a one-time activity. After you do this once, the **Copy SMS Content Templates** menu item won't be visible on the UI. However, if you need to do this action again, you can set the profile option, ORA_IRC_SMS_TEMPLATES_CONTENT_COPIED_TO_WHATSAPP to **N**. This will enable the menu item. However, we don't recommend doing this multiple times because duplicate WhatsApp templates will exist and you'll have to manually deactivate the older versions.

WhatsApp templates must follow the WhatsApp business policy of not using promotional, spam, or misleading content. You can only use plain text in the message. However, you can use tokens for variables like candidate name, job title, department, and so on.

Note: All templates that you create are associated with your WhatsApp Business Account.

1. In the Setup and Maintenance work area, go to:
    - **Offering**: Recruiting and Candidate Experience
    - **Functional Area**: Recruiting and Candidate Experience Management
2. Select **All Tasks** from the **Show** list and then select the **WhatsApp Notification Template Library** task.
3. On the WhatsApp Message Templates page, choose from:
    - Select **Create Template** to create a template from scratch. Then, go to step 4.
    - On the **More Actions** menu (shown as three dots) shown next to the page header, select **Copy SMS Content Templates**. A confirmation dialog message is shown. Once you confirm, the WhatsApp templates get automatically created and are listed on the WhatsApp Message Templates page in Draft status with the current creation date.
4. Enter basic details when creating a template from scratch:
    a. Enter a template display name.
    b. Enter the template code. This code is sent to Meta and should be as named per their guidelines. So it should be in English and start with a lowercase letter. The remaining characters can be lowercase letters, numbers, or underscores. It can't contain any special characters or uppercase letters.
    c. Select a WhatsApp message category that applies to the type of message, whether marketing, utility, or authentication.
    d. Associate the template with a content library category. The template that you want to use for starting a conversation with a candidate must be associated with the WhatsApp Conversation Starter category.
5. Create the message content:
    a. Insert tokens, as required. The type of tokens that are displayed depend on the content library category that you select. The maximum number of unique tokens you can use is 15. For the WhatsApp Conversation Starter template, you must insert the **MessageBody** token.
    b. Enter the message content in the **Template Message** field. You can't build complex logic into the message content, for example conditional statements, as per Meta guidelines. The maximum number of characters you can enter is 1024, including token names.

    > **Note:** If you've selected the WhatsApp Message Category as **Authentication**, you won't be able to insert tokens or edit the **Template Message** field.

6. Select **Save**.
7. After the template is successfully created, you can view it on the WhatsApp Message Templates page.

What to do next

Add translations to the template, if required.

Related Topics

- WhatsApp guidelines for messaging

Add Template Translations

When you create a template in English, corresponding entries will be created for each language installed in your Oracle Fusion Cloud environment. However, these entries will also be in English. You need to open the entries and add the translated content to them. The translations aren't automatically provided. Note that the template must in Draft status to add translations.

1. Select the template display name on the WhatsApp Message Templates page.
2. Select **View Translations** on the **Actions** menu (shown as three dots). The English language template and other language entries will be displayed on the Template translations drawer.

3. Select **Edit Template** on the **Actions** menu next to the language template.
4. Replace the English content with the translated content.
5. Select **Save**.

What to do next

Send the template and its translations for approval to Meta.

Send WhatsApp Templates for Approval

After a template is successfully created, you need to send it for approval to Meta. The template and its translations, if available will be sent for approval. Note that the template must be in Draft status for you to send for approval. Meta might take up to 24 hours to approve a template and its translation. You can send a template for approval only once in 24 hours. If a template is rejected by Meta, you need to create a new template and submit it for approval.

To send a single template for approval:

1. Select the template on the WhatsApp Message Templates page.
2. Select **Send for Approval** on the **Actions** menu (shown as three dots).

To send multiple templates for approval, select them and select the **Send for Approval** button found above the list of templates. If you select more than 10 templates, the process might take some time to complete. You'll get a notification on the global header when it completes. If the templates fail to be sent for approval, it could be due to a network or REST API issue with the the messaging provider service.

The status of the template will change to Pending Approval. If you view the translations of the template, they will also show as Pending Approval.

You can periodically check the status of templates to see if the templates are approved. The status will be automatically updated if Webhook has been set up. If it's not set up, you need to select the **Get Latest Template Statuses** button. For details, see the topic *Get WhatsApp Template Statuses*.

It's quite likely that Meta might not approve some translations of a template, after their evaluation is completed. To check the approval status of a translation, select the template and select **View Translations** on the **Actions** menu. You'll see the approval status in the Template translations drawer panel.

In case a translation isn't approved, you can need to create another template in English, add the translated content to it and send it for approval.

> **Note:** At any time, only one Conversation Starter Template can be in Approved or Pending Approval status. Before submitting the second one for approval, you must deactivate the one that was approved earlier.

If you switch between providers or within the same provider across multiple accounts, after templates have approved, Oracle doesn't provide support for template migration or synchronization of templates between providers. You may manage this transition by following these steps:

- Delete the existing templates before switching to another provider or account.
- Switch to the new provider.
- Recreate the templates under the new provider and submit them for approval.

Associate WhatsApp Templates with Content Library Items

After you create a WhatsApp template from scratch and send it to Meta for approval, you need to associate the template with a content library item before recruiters can start using it for automated and bulk messages.

You don't need to perform this task for WhatsApp templates that are created by copying content library items because the association is already done at the time of copying.

A template in any status except the Inactive status can be associated with a content library item.

1. In the Setup and Maintenance work area, go to:
    - **Offering**: Recruiting and Candidate Experience
    - **Functional Area**: Recruiting and Candidate Experience Management
    - **Task**: Recruiting Content Library
2. Search for the content item that you want to associate the WhatsApp template with.
3. Open the content item and edit it (if it's in Draft status) or create a new version of it (if it's active).
4. In the WhatsApp Notification Template list, select the name of the WhatsApp template. Recall that when creating the WhatsApp template, you had associated it with a content library category. Only those WhatsApp templates that belong to the same content library category as the content item that you're editing (or creating a new version of) will appear in this list. Also, only those translated WhatsApp templates that are in the current language of the application will appear in this list along with their status.

    > **Note:** The WhatsApp template status applies to the selected language template. The status and content can't be changed.

5. Save and activate the content item.

Get WhatsApp Template Statuses

When Webhook is set up, the WhatsApp template statuses are automatically updated and reflected on the WhatsApp Message Template page. When it isn't set up, use the **Get WhatsApp Template Statuses** button to track the latest approval status of templates and sync their statuses with Meta statuses periodically. If you use Twilio as your service provider, always use this button as the template statuses won't be automatically refreshed otherwise.

If you don't perform this task, the templates that are sent for approval will display the Pending Approval status or an incorrect Active status, even if the template is suspended.

After you select the **Get WhatsApp Template Statuses** button, it might take a while to see the updated statuses on the WhatsApp Message Template page. After the process is completed, the statuses will be automatically updated.

To view the approval status of a translation, select the template and select **View Translations** on the **Actions** menu (shown as three dots). You'll see the approval status in the Template translations drawer panel.

Meta might change some WhatsApp message categories (from Marketing to Utility or Authentication, for example) based on their evaluation. The updated categories will also be visible when you select this button.

For information on setting up Webhook for Syniverse, see *Webhook Configuration for a WhatsApp Messaging Provider* (Document ID 3101136.1).

Configure the Profile Option to Read WhatsApp from a Given Start Date

You can configure a profile option called ORA_IRC_2_WAY_WHATSAPP_LAST_SYNC_TIME to read WhatsApp messages from a specific start date and time.

When you enable two-way WhatsApp communications, this profile option is automatically set to the date and time when you enabled the feature. The Recruiting application will start processing WhatsApp messages that were received from that date and time onward.

This profile option is referenced by the Process Recruiting Inbound Message scheduled process, which updates the date and time automatically to the current date and time when it completes running. So, for example, if the profile option value was initially set to a date last week, and the scheduled process runs today, WhatsApp messages will be processed

from last week until today. After the scheduled process completes running, it'll set the profile option value to today's date. This will ensure that messages will be read from today onward, when the scheduled process runs next time.

If you need to read WhatsApp messages from a different date and time, you can manually update this profile option value. This set up step is optional.

1. In the Setup and Maintenance work area, select the **Tasks** icon.
2. Select **Search**.
3. On the Search page, search for the task **Manage Administrator Profile Values**.
4. Select the task name.
5. On the Manage Administrator Profile Values page, search for the profile option code **IRC_2_WAY_WHATSAPP_LAST_SYNC_TIME**.
6. Set the profile value to the desired start date and time from which WhatsApp messages should be read. It's recommended to set this value to five days before the current date. Use the UTC date and time in standard ISO 8601 format: YYYY-MM-DD HH:MM:SS to enter the value.
7. Select **Save and Close**.

Run the Scheduled Process for Inbound Messages

You need to run the Process Recruiting Inbound Message scheduled process with a 15-minute frequency to see candidates' SMS and email replies.

1. From the navigation menu, go to **Tools** > **Scheduled Processes**
2. On the Overview page, select **Schedule New Process**.
3. On the Schedule New Process page, select the menu and select **Search**.
4. Search for the **Process Recruiting Inbound Message** process.
5. Select **OK**.
6. On the Process Details page, submit the process.

Optional Configuration for WhatsApp

Manage WhatsApp Templates

Using the WhatsApp Notification Template Library task in Setup and Maintenance, you can also:

- Search for WhatsApp templates based on filters and keyword search.
- Edit WhatsApp templates.
- Deactivate templates when they’re no longer needed.
- View the following template metrics in the header area:
  - Number of active templates
  - Number of approved templates
  - Number of rejected templates
  - Number of suspended templates
  - Number of draft templates
  - Number of templates in pending approval status
  - Number of templates used in the content library

- Number of recently updated templates (those updated in the last 7 days)

These metrics include translated templates as well. So, if an active template exists in 2 translations, the total count is taken as 2 for that template. Deactivated templates aren't included in template metrics.

Search for WhatsApp Templates

You can search for WhatsApp Templates on the WhatsApp Message Templates page by one of these methods:

- Type a template name in the **Search** box.
- Filter based on the status, content library category, or WhatsApp message category.

If you type a template name in the **Search** box and also apply a filter, say for example, Approved status, you'll see a list of templates that match your template name and are in Approved status.

The Number of approved translations column displays the number of translations that were approved out of the total number sent to Meta.

Selecting a template name displays the details of the template and its approval status. If a template is suspended or rejected by Meta and they've provided a reason for it, that'll also be displayed.

When you filter templates based on the status, content library category, or WhatsApp message category, the count of templates is automatically updated in all metrics.

Edit WhatsApp Templates

You can edit templates or template translations only if they're in Draft status.

To edit a WhatsApp template, select the template display name on the WhatsApp Message Templates page and select **Edit** in the Template details drawer.

You can't edit approved or rejected templates or template translations. If you need updated versions, we recommend this approach:

- Create a new template and submit it for approval.
- After the new template is approved, deactivate the previous template.
- Associate the newly approved template with the relevant content library item using the Recruiting Content Library task.

To edit the translated version of a template in Draft status, select the template, and select **View Translations** on the **Actions** menu (shown as three dots). In the Template translations drawer, select **Edit Template** on the **Actions** menu next to the other language version. Replace the existing content with the updated content and select **Save**.

You'll also see a **Send for Approval** option on the Actions menu, which enables you to send individual translations for approval.

Deactivate WhatsApp Templates

You can deactivate a WhatsApp template in any status except the Inactive status. When you deactivate a template, its translated versions are also deactivated. The deactivated templates will be removed from Meta and its status will be marked as Inactive in Recruiting.

To deactivate a template, select it on the WhatsApp Message Templates page and select **Deactivate** on the **Actions** menu.

To deactivate multiple templates at once, select the templates and select the **Deactivate** button found above the list of templates. If you select more than 10 templates, the process might take some time to complete. You'll get a notification on the global header when it completes.

Block Phone Numbers or Phone Number Patterns

You can prevent sending SMS or WhatsApp messages to unauthorized phone numbers by blocking those numbers or by blocking those numbers that match a specific pattern. After you add the blocked list, any SMS or WhatsApp messages that are sent to these numbers or patterns will be blocked in Recruiting. You can see the Blocked status and the reason for the block when you open the SMS or WhatsApp message.

An error message is displayed to candidates on the career site when they provide a number that's on the blocked numbers and patterns list.
To enable this feature, you need to add the phone numbers or phone number patterns to a CSV file, compress the file, and then upload it using the Recruiting Messaging Configuration task.

These are the specifications of the CSV file:

- Each compressed file should contain only one CSV file.
- The file size must not exceed 2 MB.
- You must upload separate files, one for phone numbers and another for phone number patterns.

Here are a few things to consider about the file used for uploading phone numbers:

- The CSV file must contain only one column and it must not be empty.
- If the phone number contains a + sign or a comma or brackets, you must enclose them within double quotes.
- The phone number must include the country code and area code.

Here are a few things to consider about the file used for uploading phone number patterns:

- The CSV file must contain only one column and it must not be empty.
- You need to use regular expression patterns for phone number patterns. For example, to block phone numbers beginning with 1800, use a regular expression such as `1800.*`

Note: Using this task, you can also unblock phone numbers or phone number patterns that were blocked earlier.

1. In the Setup and Maintenance work area, go to:
    - Offering: **Recruiting and Candidate Experience**
    - Functional Area: **Recruiting and Candidate Experience Management**
    - Task: **Recruiting Messaging Configuration**
2. If you haven't uploaded phone numbers or phone number patterns so far, you can download a sample file from the downloadable links available in the Block Phone Numbers or Patterns section. Next, select **Edit** in this section.
3. From the **Manage Phone Numbers or Patterns** list, select one of these options:
    - **Add Phone Numbers**: Block phone numbers.
    - **Add Patterns**: Block phone number patterns.
    - **Delete Phone Numbers**: Unblock phone numbers.
    - **Delete Patterns**: Unblock phone number patterns.

4. For each of the above actions, upload a separate CSV file that contains the numbers or patterns. So if you're using a CSV file to block some phone numbers, you must upload a different CSV file for unblocking some phone numbers.

   If you'd blocked some phone numbers earlier, the new phone numbers that you upload now will get added to the blocked list.
5. Select **Save**.

What to do next

You can also download the list of blocked phone numbers or phone number patterns by selecting the respective download links. For SMS messages, you can generate a report from the Reports for Text Messages section in this task to understand how many SMS messages were blocked per country.

In the Redwood version of Recruiting, you can resend blocked SMS messages, if you unblock the phone numbers or phone number patterns.

Extensibility for WhatsApp

WhatsApp messages and the WhatsApp filter can be shown or hidden in Message Center using a Visual Studio page property, **showWhatsApponMessageCenter**. For more details, see *How do I control the display of a UI element in Visual Builder Studio?*.

Export and Import WhatsApp Configuration Data

You can export the following WhatsApp configuration details from one application environment and import them into another:

- Name and description of WhatsApp messaging providers
- Allowed list of countries for WhatsApp
- Daily limits for WhatsApp messages, which includes the system hard limit, candidate message limit, and the system soft limit

These details are exported as a CSV file. When you import the details, the following changes occur in the destination environment:

- WhatsApp messaging providers that are in the CSV file are added to the existing list of WhatsApp providers.
- The allowed list of countries and daily limits for WhatsApp messages are replaced with the corresponding data from the CSV file.

Note that the existing functionality for exporting and importing of SMS configuration details remain the same. So, when you perform the export and import tasks, the SMS configurations in the destination environment are also updated as follows:

- SMS providers from the imported data are added to the existing list of providers
- Daily limits for SMS are replaced by the imported data
- Allowed list of countries for SMS are also updated with the imported data

Export WhatsApp Configuration Data

1. In the Setup and Maintenance work area, go to:
   - Offering: Recruiting and Candidate Experience
   - Functional Area: Recruiting and Candidate Experience Management
   - Task: Recruiting Messaging Configuration
2. From the **Actions** menu (marked by a down arrow), select **Export to CSV** > **Create New**.

> **Note:** If you don't see the **Actions** menu, enable it from the **View** menu by selecting **Columns** > **Actions**.

3. Edit the process name and description, as required.
4. Submit the process.
5. After a few minutes, select the **Export to CSV** option from the **Actions** menu again.
6. Select **Ready for Download**.
7. On the Export Setup Data to CSV File Results page, select **Download File**.

The CSV file is downloaded to your local folder as a compressed file.

Import WhatsApp Configuration Data

To import the WhatsApp configuration details into the destination environment:

1. Open the destination environment.
2. From the **Actions** menu (marked by a down arrow) next to the Recruiting Messaging Configuration task, select **Import from CSV** > **Create New**.
3. Select the compressed CSV file that was downloaded.
4. Submit the process.
5. To check whether the process has completed successfully, look for the **Ready for data validation** option on the **Import from CSV** menu.
6. Select the Recruiting Messaging Configuration task to check whether the configuration details are imported successfully.

Enable Candidates to Opt Out of WhatsApp Communications

Candidates have the flexibility to opt in or opt out of WhatsApp communications. To stop receiving WhatsApp messages, they can send a message with a STOP keyword or similar in the WhatsApp thread that they're communicating with hiring team members. To resume receiving messages, they can send a message with a START keyword or similar in the same thread.

These predefined profile options that are currently available for SMS can also be used for WhatsApp. The keywords sent by the candidate to start or stop WhatsApp messages are validated against these profile values.

Profile Options for WhatsApp Communications

Profile Option	Default Values
ORA_IRC_CAND_SMS_OPTOUT_PATTERN	STOP, STOPALL, UNSUBSCRIBE, CANCEL, END, QUIT
ORA_IRC_CAND_SMS_OPTIN_PATTERN	START, UNSTOP

> **Note:** This feature uses the Webhook functionality. The Webhook used for reading incoming WhatsApp messages is used for the opt-out feature as well. The configured Webhook sends all incoming messages from candidates to Oracle Recruiting, which in turn validates the messages against the opt-out profile values. If it finds a match, any new messages from Recruiting aren't sent to the respective candidates. For details about configuring the opt-out feature, see *Webhook Configuration for WhatsApp Messaging Providers*.

Communication Channel Preferences

When a candidate opts out, WhatsApp is removed as a preferred communication channel from the candidate's profile. If the candidate's email is verified and preferred, the email will continue to be used for communications. If it's verified

but not preferred, it's set as the preferred channel and a notification is sent to the candidate about this change. A new content library template is now available for sending this notification:

- Category: Candidate Opt-out Notification (ORA_CAND_OPTOUT_UPDATE_EMAIL)
- Content Item Name: Email Notification To Candidate for Updated Communication Channel from WhatsApp
- Code: WA_OPTOUT_CAND_COMM_PREF_UPD

In the meantime, they can also set SMS as their preferred communication channel. If the candidate sends START again to resume WhatsApp communications, it's added back as their preferred communication channel along with email.

Related Topics

- Enable Candidates to Opt Out of SMS Messages

Message Center Setup

Workflow to Set Up Message Center

Message Center is available only when the Redwood experience is enabled in Recruiting Booster.

Before you start

Set up these communication channels as per your business needs:

- *Set Up Two-Way SMS communications*
- *Set Up Two-Way Email Communications*
- *Set Up Two-Way WhatsApp Communications*

Next, complete these steps to configure Message Center:

Here's what to do

1. *Enable Redwood for Messaging in Recruiting*
2. *Access Privileges and Profile Option for Message Center*
3. *Run Scheduled Processes for Message Center*
4. *Optional Configuration for Message Center*

Related Topics

- Profile Options for Messaging

Access Privileges and Profile Option for Message Center

Complete these steps:

1. Grant the Access Recruiting Message Center privilege (IRC_ACCESS_RECRUITING_MESSAGE_CENTER) to the recruiter and hiring manager role with the respective aggregate privilege:

- Access Recruiting Message Center as Recruiter (ORA_IRC_ACCESS_RECRUITING_MESSAGE_CENTER_AS_RECRUITER)
- Access Recruiting Message Center as Hiring Manager (ORA_IRC_ACCESS_RECRUITING_MESSAGE_CENTER_AS_HIRING_MANAGER)

2. To view the **Compose** button, the privilege IRC_INTERACT_WITH_CANDIDATE_PRIV is required. It's already added to these roles:
   - ORA_IRC_HIRING_MANAGER_ABSTRACT
   - ORA_IRC_RECRUITER_JOB

   If you're creating a custom role, ensure that you add this privilege to the role.
3. Enable the profile option, **ORA_IRC_MESSAGE_CENTER_ORACLE_SEARCH_ENABLED**. For details, see *How do I enable a profile option?*.

Related Topics

- Profile Options for Messaging

Run Scheduled Processes for Message Center

Run these scheduled processes:

1. Run this scheduled process once for the first time and later as needed. It's not required to schedule it on a recurring basis. You must run it if you change the timespan for displaying past messages, for example, from 90 days to 120 days.
   - **ESS job to create index definition and perform initial ingest to OSCS**
   - **Index Name to Reingest**: fa-hcm-irc-messages
2. Run the *Process Recruiting Inbound Message* scheduled process as needed.

Optional Configuration for Message Center

You can optionally specify these configuration options for Message Center.

- *Configure the Time Span for Displaying Messages*
- *Enable AI Assist in Message Center*
- *Improve the Performance of Message Center*
- *View the Compose Button in Message Center*

Configure the Time Span for Displaying Messages

Configure the time period from which messages must be displayed in Message Center. The default is set to 180 days in the past.

1. In the Setup and Maintenance work area, go to:
   - **Offering:** Recruiting and Candidate Experience
   - **Functional Area:** Recruiting and Candidate Experience Management

- **Task:** Recruiting Messaging Configuration

2. Scroll down to the Message Center Settings section, and enter the number of past days to display messages from. The maximum number allowed is 365 days.

Enable AI Assist in Message Center

You can use AI Assist while composing and replying to emails using Message Center.

To use AI Assist while replying to emails and to view the email summary before sending a reply, you need to enable the profile option, HCM_GENAI_IRC_REPLY_MESSAGE_ENABLED.

To use AI Assist while composing emails, you need to enable the profile option, HCM_GENAI_IRC_COMPOSE_MESSAGE_ENABLED.

For details, see *Enable AI Assist for Compose and Reply Actions*

Improve the Performance of Message Center

To improve the performance of the Message Center, these profile options are available. If required, you can change their values:

- Message Center Requisition Batch Size (ORA_IRC_MSGCNTR_OSCS_REQ_BATCH_SIZE): The number of requisitions to fetch per batch from Oracle search. The default is 10,000 per batch, which is the maximum value that can be set.
- Message Center Requisition Maximum Limit (ORA_IRC_MSGCNTR_OSCS_REQ_IDS_MAX): The maximum number of requisitions to fetch from Oracle Search and display in the Message Center per user. The maximum value should be 30000. The default value is 10000.

View the Compose Button in Message Center

To view the Compose button, the privilege IRC_INTERACT_WITH_CANDIDATE_PRIV is required. It's already added to these roles:

- ORA_IRC_HIRING_MANAGER_ABSTRACT
- ORA_IRC_RECRUITER_JOB

If you're creating a custom role, ensure that you add this privilege to the role.

Enable Recruiters to View All Messages

When recruiters apply the **All messages** or **Sent by others** filters, they can't see emails for a candidate if they don't have access to all the associated contexts. However, they can see all SMS messages if they have access to at least one of the contexts associated with the messages. However, you can provide them with unrestricted access to these messages through a profile option, **ORA_IRC_MSG_CENTER_SEARCH_VIEW_UNRESTRICTED**.

When you enable this profile option, recruiters can:

- View the list of all emails, SMS, and WhatsApp messages for all requisitions, pools, and events that they have access to. Otherwise, they can only view messages from the most recently modified 10,000 requisitions, 5000 pools, and 5000 events.
- View the list of all emails, SMS, and WhatsApp messages in the context of candidate profiles, prospects, submissions, events, or pools that they don't have access to.

Note: While recruiters can view these messages in the search results list on the left panel, they can view the message details on the right panel, only if they have access to the candidate and associated contexts.

This profile option enhances the search performance of the Message Center and provides a unified experience across the Messages tab and Message Center.

A few points to consider while enabling the profile option:

- By default, this profile option is set to **N** at the site level. If recruiters in your organization have access to all requisitions, pools, and events, it's recommended to set the site level value to **Y**. To provide access to only some users, you can set the user-level value to **N** for those users. This will override the site-level value.
- Unrestricted data access is provided only for the search feature but not for the contexts.
- The values previously set in these two profile options will be ignored:
  - ORA_IRC_MSGCNTR_OSCS_REQ_BATCH_SIZE (Message Center Requisition Batch Size)
  - ORA_IRC_MSGCNTR_OSCS_REQ_IDS_MAX (Message Center Requisition Maximum Limit)

Extensibility for Message Center

You can enable or disable these features in Message Center using the following Visual Basic page properties:

- enableReplyonMessageCenter – This enables the **Reply** button on emails and SMS messages.
- showGoToCandidateProfile – This enables the **Go to Candidate Profile** button on these pages.
- showSMSonMessageCenter – This enables the display of SMS messages in Message Center. When it's disabled, the SMS filter option is also hidden.
- showGenAIEmailSummary – This enables the display of the email summary section generated by AI. Even if you've enabled AI Assist for replying to emails, you can still disable the email summary section using this property. This won't impact the use of the AI Assist button while composing the email reply.
- showVisitorMessagesOnMessageCenter – This enables the display of visitor messages and the Text Assistant replies to their messages in Message Center.

Related Topics

- How do I control the display of a UI element in Visual Builder Studio?

Common Setup Tasks

Prerequisites for AI Agent Studio

The prerequisites for using AI Agent Studio are:

- Your environment must have the appropriate services for Oracle Applications Platform deployed. For more information, see *FAQ2521 on My Oracle Cloud Support*.
- Enable permission groups for the appropriate roles. See *Access Requirements for AI Agent Studio*.

- The agents you can view depend on the roles and privileges assigned to you. To access an agent or agent workflow, your role must be explicitly granted access to it by an AI Studio Administrator. See *How can I give users access to AI agents* and *Access Requirements for AI Agent Studio*.

Access Requirements for the Recruiting Inbox Response Agent

The Recruiting Inbox Response Agent is secured by the following Spectra Authorization Service (SAS) role: ORA_HCM_IRC_RECRUITING_SCHEDULED_WF_AGENT_ACCESS.

Access requirements for the Recruiting Inbox Screening Agent

To schedule the agent, you need the ORA_HCM_IRC_RECRUITING_SCHEDULED_WF_AGENT_ACCESS privilege.

By default, recruiting manager users have the View Inappropriate Message Content (IRC_VIEW_INAPPROPRIATE_MESSAGE_CONTENT_PRIV) privilege. This privilege allows users to view unmasked message content.

Set Up the Text Assistant

Workflow to Set Up the Text Assistant

Here are the steps to set up the Text Assistant in Recruiting, which enables candidates to interact with the Career Coach using SMS and WhatsApp.

Required Steps

1. *Enable the Career Coach Agent for Career Sites*
2. *Configure the Text Assistant*
3. Add these providers as required:
    - *Add an SMS Messaging Provider for the Text Assistant*
    - *Add a WhatsApp Messaging Provider for the Text Assistant*

Optional Step

1. *Configure Profile Options for the Text Assistant*

Enable the Career Coach Agent for Career Sites

You must enable the Career Coach workflow agent for a career site, if you haven't already done so.

This agent is available as a predefined agent and can also be modified. For details, see *Enable AI Agent for Career Sites* (MOS KB 873870) on My Oracle Support.

When you enable this agent for a messaging provider, the predefined agent code ORA_CAREER_COACH is used by default. If you've modified the agent, use the new agent code.

Limits for Text Assistant Messages

Setting limits for outbound text assistant messages is necessary to maintain system stability, protect service availability for all users, control infrastructure costs, and reduce the risk of misuse (for example, spam or unauthorized automation). These limits include:

- Maximum number of text assistant messages that can be sent to all users (including candidates and visitors) per day – This is called the **agent system hard limit**. This represents the maximum number of agent calls that are made for all users in a day.
- Maximum number of text assistant messages that can be sent to a candidate or visitor per day – This is called the **agent candidate limit**. This represents the maximum number of agent calls that are made in a day for a single candidate or visitor.

The following threshold limits will be modified to include the text assistant limits, in addition to the recruiter and auto-generated limits:

- **System hard limit** – The maximum number of all types of messages that can be sent across all candidates in a day.
- **Candidate message limit** – The maximum number of all types of messages that can be sent to each candidate in a day.
- **System soft limit** – The number of all types of messages that can be sent across all candidates in a day that initiates a warning notification.

> **Note:** "All types of messages" refers to hiring team, auto-generated, and text assistant messages. When the text assistant isn't enabled, it refers to only hiring team and auto-generated messages.

Here's what happens when one of the above limits is reached:

Table 1: Limits for all users per day

Agent system hard limit	System hard limit	Result
Reached	Not reached	Message displayed to the candidate that the agent is unavailable to respond.
Reached	Reached	No message is displayed to the candidate.
Not reached	Reached	No message is displayed to the candidate.

Table 2: Limits for each user per day

Agent candidate limit	Candidate message limit	Result
Reached	Not reached	Message displayed to the candidate that the agent is unavailable to respond.
Reached	Reached	No message is displayed to the candidate.

Agent candidate limit	Candidate message limit	Result
Not reached	Candidate message limit is available with 1 message remaining.	Message displayed to the candidate that the agent isn't available to respond.

Configure the Text Assistant

Configuring the text assistant involves confirming the agent team code, setting limits for outbound SMS and WhatsApp messages, and enabling visitors to interact with the text assistant.

Before you start

To enable the text assistant in your SMS or WhatsApp provider configuration, the IRC_REST_SERVICE_ACCESS_INBOUND_SMS_WEBHOOK_PRIV privilege should be added to the Webhook user role.

For details, see *Webhook Setup for Two-Way SMS Communications* and *Webhook Configuration for WhatsApp Messaging Providers*. Note that the text assistant responds to incoming messages that are processed by Webhook only. It doesn't respond to incoming messages processed by the Process Recruiting Inbound Message scheduled process.

Here's what to do

1. In the Setup and Maintenance work area, go to:
    - **Offering**: Recruiting and Candidate Experience
    - **Functional Area**: Recruiting and Candidate Experience Management
    - **Task**: Recruiting Messaging Configuration
2. In the Daily Limits for SMS and WhatsApp Messages section, select **Edit**.
3. Configure these options in the SMS and WhatsApp columns:
    - **Maximum number of text assistant messages to send across all candidates:** This is the agent system hard limit. Any candidate conversations initiated after this limit is reached won't be processed by the agent. Note that any pending conversations with the candidate won’t be continued the next day. The candidate has to initiate a fresh conversation. When this limit is reached, a notification is sent to the administrator.
    - **Maximum number of text assistant messages to send to each candidate:** This is the agent candidate limit. Any candidate conversations initiated after this limit is reached won't be processed by the agent. When this limit is reached, a notification is sent to the administrator.

    Note:
    - UTC time zone is considered when counting the limits.
    - These limits are reset to zero at the start of UTC day, at 00:00:00 hours. When the limits are reset, candidates can initiate fresh conversations with the text assistant.
4. Select **Save**.
5. On the Recruiting Messaging Configuration page, in the Text Assistant section, ensure that the **Agent Team Code** field has a value of ORA_CAREER_COACH.

   If you’ve modified the Career Coach agent, use the new agent team code.

6. In the Additional Communication Settings section, enable visitors to send messages.

   A user is considered a visitor if their phone number isn't present in the Recruiting database. Phone numbers that aren't verified are also considered as part of visitor phone numbers, even if they're associated with a candidate.

Related Topics

- Limits for Text Assistant Messages

Add an SMS Messaging Provider for the Text Assistant

You need to create and activate a messaging provider that will be used for communicating with candidates using the text assistant.

If you already have an active SMS provider with SMS communication enabled, and you edit the provider to enable agent communication, the SMS communication will be disabled. You'll then need to enter the text assistant threshold limits and re-enable SMS communication.

Please ensure that SMS configurations are different for each pod—production and other test pods.

1. In the Setup and Maintenance work area, go to:
   - **Offering**: Recruiting and Candidate Experience
   - **Functional Area**: Recruiting and Candidate Experience Management
   - **Task**: Recruiting Messaging Configuration
2. On the Recruiting Messaging Configuration page, in the **SMS Messaging Providers** section, select **Add**.
3. Enter a name and description.
4. Select a provider.
5. Enter the maximum limit for a message length, in number of characters.

   The Body parameter includes the full text of the message you want to send. For Twilio, it's limited to 1600 characters. Based on your business needs, you can set the message length limit to 1600 characters or less.

6. Select **Enable two-way SMS communications** to allow candidates to reply to SMS messages.
7. Select **Enable the candidate text assistant** if you want the text assistant to automatically respond to candidate SMS messages.

   When you do this, you'll see two tabs displayed, where you can define the details for two SMS channels: The **Hiring Team Messages** tab is for the first channel that's used for SMS messages sent by the recruiting team. The **Automated and Text Assistant Messages** tab is for the second channel that's used for automated messages and text assistant responses.

8. Enter info in the **Request Details**, **Authentication**, **Headers**, and **Body** sections for the selected service provider in both tabs.

   For more information on entering info for the Twilio and Syniverse service providers, see the document *Examples of Adding SMS Providers for the Text Assistant* on My Oracle Support (KB38155).

> **Note:**
>
> - For processing outbound messages, the SMS messaging provider's API is expected to return the response in JSON format. To ensure smooth processing of these messages, we recommend that you include the **Accept** header in the Headers section and specify its value as **application/json**.

9. Select **Test Outbound Message** to send a test message and make sure that the configuration is properly done.
10. You need to test the outbound message for each channel type, hiring team and agent messages.

    In the **SMS Message Info** section, enter the phone number for each channel and select the channel type.

11. Save and close the page once the test is successful.

Add a WhatsApp Messaging Provider for the Text Assistant

Create and activate a WhatsApp messaging provider that will enable the Text Assistant to communicate with candidates.

If you already have an active WhatsApp provider with WhatsApp communication enabled, and you edit the provider to enable Text Assistant communication, the WhatsApp communication will be disabled. You'll need to enter the text assistant threshold limits and re-enable WhatsApp communication.

Ensure that WhatsApp configurations are different for each pod—production and other test pods.

1. In the Setup and Maintenance work area, go to:
    - **Offering**: Recruiting and Candidate Experience
    - **Functional Area**: Recruiting and Candidate Experience Management
    - **Task**: Recruiting Messaging Configuration
2. On the Recruiting Messaging Configuration page, in the **WhatsApp Messaging Providers** section, select **Add**.
3. Enter a name and description.
4. Select a provider.
5. Enter the maximum limit for a message length, in number of characters.

    The Body parameter includes the full text of the message you want to send. For Twilio, it's limited to 1600 characters. Based on your business needs, you can set the message length limit to 1600 characters or less.

6. Select **Enable the text assistant** if you want the text assistant to automatically respond to candidate WhatsApp messages.

    When you do this, you'll see two tabs displayed, where you can define the details for two WhatsApp channels: The **Hiring Team Messages** tab is for the first channel that's used for WhatsApp messages sent by the recruiting team. The **Automated and Text Assistant Messages** tab is for the second channel that's used for automated messages and text assistant responses.

7. Enter info in the **Request Details**, **Authentication**, **Headers**, and **Body** sections for the selected service provider in both tabs.

    For more information on entering info for the Twilio and Syniverse service providers, see the document For details, see the document *Adding a WhatsApp Messaging Service Provider* on My Oracle Support.

8. Select **Test Outbound Message** to send a test message and make sure that the configuration is properly done.
9. You need to test the outbound message for each channel type, hiring team and agent messages.

    In the **WhatsApp Message Info** section, enter the phone number for each channel and select the channel type.

10. Save and close the page once the test is successful.

Related Topics

- Webhook Configuration for a WhatsApp Messaging Provider

Configure Profile Options for the Text Assistant

You can optionally configure the following profile options for the text assistant:

Feature	Profile Option	Profile Value
Number of seconds to wait for the text assistant to respond to the candidate's message. If the text assistant is unable to reply within this time, the candidate is notified that the agent is unavailable. This profile option must be created and then set to the desired value.	IRC_TEXT_AGENT_MAX_RESPONSE_TIME	Enter the number of seconds. The default value is 120 seconds.
The time period for a conversation to be considered active. Within this time period, the conversation between the text assistant and the candidate are considered as part of the same session and there's continuity in the text assistant responses. If the candidate responds after this time period elapses, the text assistant won't continue the conversation but instead start a fresh conversation.	ORA_IRC_TEXT_AGENT_ACTIVE_SESSION	The default value is 4 hours.

Related Topics

- Create and Edit Profile Options

Enable Redwood for Messaging in Recruiting

See these topics to enable the Redwood experience in Oracle Cloud HCM. This enables you to take advantage of the enhanced messaging features in Recruiting:

- *Enable your HCM Redwood pages and set up Oracle Search*
- *Set profile options for Redwood pages*

Opt in to Recruiting Booster

To enable Recruiting Booster and its functionalities, you first need to opt in to Recruiting Booster.

Before you start

You need these privileges to opt in:

- Review Applications Offering (ASM_REVIEW_APPLICATIONS_OFFERINGS_PRIV)
- Configure Oracle Fusion Applications Offering (ASM_CONFIGURE_OFFERING_PRIV)

Here's what to do

1. Go to **Setup and Maintenance > Recruiting and Candidate Experience**.
2. Select **Change Feature Opt In** then enable **Recruiting Booster**.
3. Save your changes.

Enable AI Assist for Compose and Reply Actions

To use AI Assist while composing email, SMS, or WhatsApp messages or replying to candidates, you must enable a profile option corresponding to the page where you want to use AI Assist.

These profile options correspond to the page where you can compose or reply to messages with AI Assist:

Feature	Page	Profile Option
Compose messages	• Candidate profile page (Messages tab) • Message Center (Messages tab)	HCM_GENAI_IRC_COMPOSE_MESSAGE_ENABLED
Reply to candidate messages and also generate the conversation summary when replying to messages	Message Center (Messages tab)	HCM_GENAI_IRC_REPLY_MESSAGE_ENABLED
Send messages to multiple candidates	Candidate lists in candidate pools, job applications, prospects, events and search pages	HCM_GENAI_IRC_SEND_MESSAGE_ENABLED

To enable AI Assist, you must first create these profile options, enable them at the site level, and then enable Recruiting to access the profile option value. The steps below explain how to perform these tasks for the HCM_GENAI_IRC_COMPOSE_MESSAGE_ENABLED profile option, as an example. Use the same steps for the other profile options also, but with the correct profile option code and name in the steps.

Create the Profile Option

1. In the Setup and Maintenance work area, select the **Tasks** icon.
2. Search for the task, **Manage Profile Options.**
3. Select the task name from the search results.
4. On the Manage Profile Options page, select the **New** icon.
5. On the Create Profile Option page, create the profile option by entering these values:
    - **Profile Option Code:** HCM_GENAI_IRC_COMPOSE_MESSAGE_ENABLED
    - **Profile Display Name:** Enable AI Assist for messages
    - **Application:** Recruiting
    - **Module:** Recruiting Common
    - **Description:** Enable AI Assist for composing emails or text messages
    - **Start Date:** Enter today's date
6. Select **Save and Close**.
7. In the HCM_GENAI_IRC_COMPOSE_MESSAGE_ENABLED: Profile Option Levels section, enable the profile option at the site level and set it as updatable.
8. Select **Save and Close**.

Enable the Profile Option at the Site Level

1. In the Setup and Maintenance work area, select the **Tasks** icon.
2. Select **Search**.
3. Search for the task, **Manage Administrator Profile Values**.
4. Select the task name from the search results.
5. On the Manage Administrator Profile Values page, search for the profile option code, **HCM_GENAI_IRC_COMPOSE_MESSAGE_ENABLED**.
6. In the HCM_GENAI_IRC_COMPOSE_MESSAGE_ENABLED: Profile Values section, select the **New** icon.
7. Select **Site** as the profile level.
8. Set the profile value to **Y**.
9. Select **Save and Close**.

Enable Recruiting to Access the Profile Option Value

1. In the Setup and Maintenance work area, search for the task **Manage Profile Categories**.
2. Select the task name from the search results.
3. Search for the category, **ORA_FND_ANON_REST_ACCESS** (for anonymous users) or **ORA_FND_AUTH_REST_ACCESS** (for authorized users).
4. In the Profile Options section, select the **New** icon.
5. Select the profile name **HCM_GENAI_IRC_COMPOSE_MESSAGE_ENABLED** from the list, or search for it and select it.
6. Select **Save and Close**.

Configure Administrator Notifications for Messaging

Set up an email address to notify administrators when:

- SMS and WhatsApp threshold limits are reached.
- Connection errors occur for incoming and outgoing SMS, WhatsApp, and email messages.

Connection errors can occur if:

- The messaging provider is configured incorrectly.
- A client certificate has expired.
- Network or other connectivity issues prevent messages from being processed.

When the Process Recruiting Inbound Message scheduled process detects a connection error, it sends the **IRC Communication Channel Error Notification** alert (IRC_COMM_CHANNEL_ERRORS) to the configured email address.

1. Go to **Setup and Maintenance** > **Recruiting and Candidate Experience** > **Recruiting and Candidate Experience Management** > **Recruiting Messaging Configuration**.
2. Enter the email address in the Administrator Settings section.
3. Save your changes.

Profile Options for Messaging

Profile options used in candidate messaging are summarized in this table.

Profile Options for Messaging

Feature	Profile Option	Profile Value
View the Redwood job application details page.	ORA_IRC_RECRUITING_REDWOOD_ENABLED ORA_IRC_REQUISITION_REDWOOD_ENABLED	Y
Read SMS messages from a specific start date and time.	ORA_IRC_2_WAY_SMS_LAST_SYNC_TIME	Use the UTC date and time in standard ISO 8601 format: YYYY-MM-DD HH:MM:SS. It's recommended to set this value to five days before the current date.
Read email messages from a given start date and time.	IRC_2_WAY_EMAIL_LAST_SYNC_TIME	Set the profile value to yesterday's date, that is Current date - 1. Use the UTC date and time in standard ISO 8601 format: YYYY-MM-DD HH:MM:SS. If you don't set a value for this profile option, it'll be set to a default value of 7 days before the current date.
Read WhatsApp messages from a given start date and time.	ORA_IRC_2_WAY_WHATSAPP_LAST_SYNC_TIME	Use the UTC date and time in standard ISO 8601 format: YYYY-MM-DD HH:MM:SS to enter the value. It's recommended to set this value to five days before the current date.
Compose messages using AI Assist from the: • Candidate profile page (Messages tab) • Message Center	HCM_GENAI_IRC_COMPOSE_MESSAGE_ENABLED	Y
Reply to candidate messages using AI Assist and also generate the conversation summary when replying to messages in the Message Center.	HCM_GENAI_IRC_REPLY_MESSAGE_ENABLED	Y
Send messages to multiple candidates using AI Assist.	HCM_GENAI_IRC_SEND_MESSAGE_ENABLED	Y
Type of email attachments that are allowed.	ORA_IRC_MISC_ATTACH_FILE_TYPES	Existing file types include .txt, .rtf, .doc, .docx, .pdf, .htm, .html, .jpeg, .png, .zip, .HEIC, .pptx, .msg, .jpg, .pdf, and .odt. Change them as required in the same format.
Type of email attachments that aren't allowed.	ORA_IRC_MISC_ATTACH_UNSUPPORTED_FILE_TYPES	Enter as required in the same format as allowed file types.
Enable the search feature in Message Center.	ORA_IRC_MESSAGE_CENTER_ORACLE_SEARCH_ENABLED	Y

Feature	Profile Option	Profile Value
The number of requisitions to fetch per batch from Oracle search and display in Message Center.	ORA_IRC_MSGCNTR_OSCS_REQ_BATCH_SIZE	The default is 10,000 per batch, which is the maximum value that can be set.
The maximum number of requisitions to fetch from Oracle Search and display in the Message Center per user.	ORA_IRC_MSGCNTR_OSCS_REQ_IDS_MAX	The maximum value should be 10000. The default value is 10000.
Gain unrestricted access to messages when you apply the All messages or Sent by others filters.	ORA_IRC_MSG_CENTER_SEARCH_VIEW_UNRESTRICTED	Y
Stop receiving SMS messages.	ORA_IRC_CAND_SMS_OPTOUT_PATTERN	STOP, STOPALL, UNSUBSCRIBE, CANCEL, END, QUIT
Start receiving SMS messages.	ORA_IRC_CAND_SMS_OPTIN_PATTERN	START, UNSTOP
Configure the use of an alternate email address for internal candidates.	ORA_IRC_INTERNAL_CAND_ALT_EMAIL_ENABLED	Y
Number of minutes to disable the **Send Reply** action while the email assistant is processing the email.	ORA_IRC_2W_EMAIL_AGENT_USERACTION_DISABLE_DURATION	Enter the number of minutes. The default value is 15 minutes. The **Send Reply** button will be enabled once this time elapses. If you set this value less than the auto-skip time-out value, then the email will be available for both the recruiter and email assistant to respond because the Send Reply button will be enabled even while the agent is processing the email.
Number of minutes to wait for the email assistant to read and process the email. This profile option isn't delivered by default. Create it and then set the desired value.	IRC_2W_AGENT_AUTO_SKIP_TIMEOUT	Enter the number of minutes. The default value is 15 minutes. If the agent can't reply within this time, the email is available for the recruiter to respond.
Number of email assistant responses that can be sent across all candidates in a day.	ORA_IRC_2W_EMAIL_AGENT_SYSTEM_THROTTLE_LIMIT	The default value is 1000.
Number of email assistant responses that can be sent to a single candidate in a day.	ORA_IRC_2W_EMAIL_AGENT_CAND_THROTTLE_LIMIT	The default value is 5.

Related Topics

- Enable AI Assist for Compose and Reply Actions
- How do I enable a profile option?