Oracle Fusion Cloud Talent Management

How do I set up a request information flow?

FA Latest

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1 Introduction

About this Playbook

Use this playbook to learn how to create and use a request information flow to obtain additional information from external candidates once they have applied to a job.

A request information flow is a sequence of blocks containing fields that candidates complete. Blocks can be configured on one page with multiple blocks.

The creation and use of a request information flow involves different personas:

- The administrator creates the request information flow.
- The administrator adds the request information flow in a candidate selection process.
- The administrator creates a notification to request more information from the candidate.
- The candidate provides the information requested.

2 Create a Request Information Flow

Create the Flow

You can create the flow from scratch or, you can use an existing flow as a starting point and use the **Copy to Create New Application Flow** action and adapt the flow to your need.

You can create multiple flows to adapt to the different business needs. For the scenario, you'll create a flow from scratch.

1. In the Setup and Maintenance work area, go to **Offering: Recruiting and Candidate Experience > Functional Area: Candidate Experience > Task: Job Application Flow Configuration**.
2. On the Job Application Flows page, click **Create**.
3. Enter basic info about the flow such as the name, code, and description.
4. In the Application Flow Type field, select **Request Information**.
5. Click **Save and Continue**.

Create a Version of the Flow

You can create one or multiple versions of a flow to adapt the flows to your business needs.

1. In the Versions section, click **Create**.
2. Enter the version name.
3. Enter the version start date. You can also select the **Start on Activation** option to activate the version as soon as it's ready and activated.
4. Select options for the flow.
    - E-Signature: You can ask candidates to sign the form with an e-signature. The e-signature appears at the end of the flow. The content of the Job Application E-Signature Statement is configured in the Recruiting Content Library.
    - Campaign Opt In: You can ask candidates if they agree to receive marketing communications. Candidates don't have to agree to proceed with the flow. The opt in check box appears with this short sentence "I agree to receive marketing communications." If an active version of the campaign opt-in statement is available in the Recruiting Content Library, the sentence is displayed as a link that the candidate can click to read the full statement. The content of the Campaign Opt In Statement is configured in the Recruiting Content Library.
    - One Page Application Flow: Select this option to display the flow on a single scrollable page. If you don't, the information will be displayed on multiple pages.
    - Job Alert Opt In: You can ask candidates if they agree to receive updates about new job opportunities. The content of the Job Alert Notification is configured in the Recruiting Content Library.

Modify Fields in Blocks

For certain blocks, you can modify fields appearing in the blocks. This is done using the Person profile type.

Blocks that can be changed	Profile type content section where to change fields in the block
Education	Use the Degrees content section to change fields in the Education block.
Experience	Use the Previous Employment content section to change fields in the Experience block.
Languages	Use the Languages content section to change field sin the Languages block.
Licenses and Certificates	Use the Licenses and Certifications content section to change fields in the Licenses and Certificates block.
Skills	Use the Skills and Qualifications content section to change fields in the Skills block.
Work Preferences	Use the Work Requirements content section to change fields in the Work Preferences block.

> **Note:** Changes to this area affect the overall HCM data platform. Before making any changes, you should test the application flows to view the default fields and analyse if changes are required.

1. Go to **My Client Groups > Profiles > Profile Types**.
2. On the Profile Types page, click **Person**.
3. In Content Sections, click the section name where you want to change fields.
4. In Content Section Properties, decide which fields to display or hide.
5. Click **Save and Close**.

Create Sections Within a Block

You can have blocks that have multiple sections to collect candidate data. For example, you could have an Education block with two sections: Bachelor Degree and Doctoral Degree.

This type of configuration applies to Certification, Education, Language, Skill, Work History, Work Preferences.

1. Go to **My Client Groups > Profiles > Profile Types**.
2. On the Profile Types page, click **Person**.
3. On the Edit Profile Type: Person page, click **Add Content Section**.

4. Select a template from these template:
    - Certification
    - Education
    - Language
    - Skill
    - Work History
    - Work Preferences (multiple sections isn't supported)
5. On the Add Content Section page, enter a name and description for the section.
6. Select the **Active** option.
7. In Content Section Properties, decide which fields you want to display or hide.
8. In the Content Section Subscribers, click **Add** then select **Recruiting**.
9. Click **Save and Close**.

Add Blocks

A flow contains sections, and sections contain blocks to collect information from candidates. You design the flow by adding blocks to sections.

These sections are always displayed in the flow, you can't remove them:

- Personal Info
- Job Application Questions
- Experience
- More About You

The Contact Information block is the only required block, you can't remove it.

If you don't add any block to a section, the section isn't displayed to candidates.

For details, see *Which blocks can I add to job application flows?*

1. To add a block in a section, select a block in the Block Library, then drag and drop it in the section. You can add the same bock more than once.
2. To remove a block from a section, use the Delete action in the block Actions menu.
3. To move a block within a section, drag and drop the block to the desired place.
4. To move a block to a different section, use drag and drop or the Move To action in the block Actions menu.
5. To reorder blocks within a section, use the Move Right and Move Left actions in the block Actions menu.
6. To change the name of a section, click the Edit icon of the section then change the name.
7. To change the name of a block, click the block name then change the name in the Block Headline field. If you use many sections within the same block, it's important to have different headlines to help candidates understand what info they need to provide. Otherwise, all sections will have the same name. For example, for an Education block with two sections, you could have Bachelor Degree and Doctoral Degree as headlines.
8. To provide instructions to candidates on how to fill a block, click the block name then add instructions. Simple formatting is supported. For instance, you can add boldface by using the tags and before and after the

text, or include hyperlinks for the candidates to reach externally-hosted web pages if additional information is required.

9. If you configured sections for a block, select a section. The selector displays sections created in the Person profile type that have Recruiting as a subscriber. You can select only one section within the same block.
10. When blocks require additional configuration, it's indicated by an error icon. The icon disappears as soon as the block setup is completed.

Add the Questionnaire Block

You can add the Questionnaire block to ask external candidates to fill additional questionnaires once they've applied to a job. For example, a recruiter might want to ask candidates to fill a consent form.

1. Add the **Questionnaire** block.
2. Click the **Questionnaire** link to edit the questionnaire block.
3. You can edit the headline of the block. The headline is the block name displayed to candidates.
4. Add instructions to provide specific information to candidates.
5. Select a questionnaire.

   The drop-down list displays active questionnaires created for the Recruiting subscriber and saved in the Job Application Flow folder.
6. Select **Confidential** for users with the privilege View Confidential Questionnaire Responses (IRC_VIEW_CONFIDENTIAL_QUESTIONNAIRE_RESPONSES) to see the responses provided by candidates in the questionnaire.
7. Select **Based on Condition** to present the questionnaire to the candidate only if a specific answer was given by the candidate in a previous Apply flow or Request Information flow.

   To use that option, a question must be created in the Question Library and a questionnaire must be assigned to the answer of that question.
8. Click **Save**.

Set Blocks as Required

You can create rules in Transaction Design Studio to set fields as required in certain blocks of a job application flow. When fields are set as required, candidates need to complete them to submit their job applications.

This type of configuration applies to Education, Experience, Languages, Licenses and Certifications, Skills, Work Preferences.

1. Activate a sandbox and page editing at the Site layer in **Settings and Actions Menu > Edit Pages > Activate a sandbox**.
2. Go to **My Client Groups > Quick Actions > HCM Experience Design Studio > Transaction Design Studio**.
3. Select the **Define Application Flow Required Fields** action.
4. Click **Add** to create and configure a rule.
5. In the Basic Details section, enter a name and description for the rule, then select an application flow.
6. In the Available Attributes section, select a data source. Fields available for the selected data source are displayed.

7. Decide which fields are required. If a field was set as required at the profile level, the Required setting is disabled. Also, the Required setting is applied per profile template. This means that if a field is set as required, the required setting applies to all content sections of that template.
8. Click **Save and Close**.

Activate the Version and Flow

When you're done creating the version, click **Save and Activate**. The version will be available for use when the start date you provided is reached, or it will be available right away if you selected the Start on Activation option. A green dot for a version indicates that the version is currently used.

When you’re done designing the flow, you activate it so it becomes available to recruiters when they create job requisitions.

Add the Request Information Flow to a Candidate Selection Process

You need to add the Request Information flow to specific phases and states within a candidate selection process. When a job application is moved to a specific state within a phase, a notification is automatically sent to candidates and a link to provide information is added in the candidate self service page.

1. In the Setup and Maintenance work area, go to **Offering: Recruiting and Candidate Experience > Functional Area: Candidate Job Applications > Task: Candidate Selection Process Configuration**.
2. On the Candidate Selection Process Configuration page, create a selection process or select an existing one.
3. Add the **Request Information** action when entering a phase, leaving a phase, or for any state within a phase.
4. On the Action: Request Information page, select the flow to request additional information from candidates.

Create a Notification to Request More Information

You use the Automated Job Application Request Info Notification to ask external candidates to provide more information. You can use the notification as is or create a new one.

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. On the Recruiting Content Library page, click Create.
3. On the Create Content Item page, enter a name and a code.
4. In the Category field, select the content type Automated Job Application Request Info Notification.
5. Enter a subject for the message.

6. Enter the message text.
    a. Use rich text features to format the text.
    b. Include tokens to personalize the message so that it's specific to the candidate in the context of the job application.
    c. Use this token if you want to add the request information flow link: RequestInformationFlowURL.
    d. Insert images and logos to align with your organization's corporate branding.

> **Note:** The maximum size of a notification is 15MB. If you exceed this limit, the notification might not be sent. To respect this limit, you can optimize images or logos in the notification.

Candidates Provide Requested Info

Candidates receive a notification to provide more information.

When they click the link in the notification, they're redirected to the Request Information flow. At the same time that the notification is sent, the link to access the flow becomes available in the candidate self service page where candidates can see a request to provide additional information for a job application. Information provided by candidates is added to their candidate file.