



# Oracle Taleo Enterprise Edition

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## Using Legacy Recruiting

**21B**



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# Preface

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

## Oracle Applications Guides

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

## Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program website](#).

## Comments and Suggestions

### Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit [My Oracle Support](#) or visit [Accessible Oracle Support](#) if you are hearing impaired.

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# 1 Recruiting Overview

## Recruiting Process

Recruiting is a solution that helps enterprises source, assess, and hire the best talent.

The Oracle Taleo Enterprise Edition suite includes several core products used for the recruiting process.

The Career Sections allows candidates to visit corporate websites, search for and apply to jobs. These Career Sections can be used for both external and internal candidates. An organization can create different Career Sections to meet their unique hiring processes and needs.

Once candidates have applied for jobs, the Recruiting Center is used by anyone in a full or partial recruiting role, including Recruiters, HR, Staffing Managers, Support Staff and Hiring Managers. The Recruiting Center provides requisition management to track and manage job openings, an advanced search tool to find candidates in your talent pools, candidate screening to improve the quality of hires, candidate submission tracking to track candidate progress through the recruiting process, interview management, offer management, etc. Many functionalities of the Recruiting Center can be configured for users in different roles. The eShare response center is another way for external users to get involved without actually having to log into an application. This is great for people who just need to review or approve offers or requisitions. All of the activity takes place with emails and links. A user can be both a Recruiting Center and an eShare user if permissions were granted.

The Onboarding (Transitions) product provides a unified, automated and customizable system for transitioning candidates, new hires and employees.

The final piece to the core set of products is the Configuration module. This is where administrators can work with settings, permissions and tools to configure the Recruiting Center, the Career Sections, and other products.

## Typical Recruiting Workflow

The table represents a typical recruiting workflow and the roles and products used in the process.

Task	Task Description	Role	Product
Create a requisition	In typical scenarios, a Recruiter and Hiring Manager collaborate during the requisition creation process. The Recruiting Center is used to create the requisition from standardized templates or from scratch.	Recruiter, Hiring Manager	Recruiting Center

Task	Task Description	Role	Product
Use questions and competencies in the requisition	When creating the requisition, recruiters use questions, skills, and prescreening tools to find the ideal candidates.	Recruiter, Hiring Manager	Recruiting Center
Approve the requisition	HR users can easily be set up for limited activities such as approving requisitions.	HR	Recruiting Center or eShare
Post and source the requisition	Once approved, Recruiters can post jobs to corporate career sections as well as job boards and use other sourcing tools from Posting and Sourcing in the Recruiting Center.	Recruiter	Recruiting Center
Candidates apply online	Candidates can apply to jobs online by accessing a career section. Employees can also apply to jobs through the Intranet.	Candidates	Career Section
Manage candidates	Recruiters can then view and manage candidates as well as share top candidates with the Hiring Manager.	Recruiter, Hiring Manager	Recruiting Center or eShare
Source more candidates	At any time in the process, Recruiters can source more candidates by conducting an Advanced Search in the Recruiting Center. Candidates sourced outside the system can easily be added to the candidate slate as well.	Recruiter	Recruiting Center
Screen and interview candidates	Recruiters can work with hiring managers in progressing the best candidates through the appropriate selection steps. The flexible workflow designer allows you to mirror your own particular recruiting process in the system.	Recruiter, Hiring Manager	Recruiting Center
Make offers to candidates	Recruiters can use the Recruiting Center to easily create offers. HR and Hiring Managers can view and approve offers and then Recruiters can extend offers to candidates.	Recruiter, HR, Hiring Manager	Recruiting Center
Candidates can view the offer on line	Candidates can view and respond to offers on line.	Candidates	Career Section
Hire candidates	Recruiters can easily move candidates to the hired status. Coordinators can track background and/or reference checks as well as close out final hiring activities.	Recruiter, HR, Recruiter Assistant	Recruiting Center, Onboarding/ Transitions
Fill and report	Finally, Recruiters, HR and Staffing Managers can use the Reporting tool to	Recruiter, HR, Staff Manager	Recruiting Center, Reporting

Task	Task Description	Role	Product
	report on filled requisitions and other important metrics.		



# 2 Getting Started

## Login

### Login Procedure

When users open the Oracle Taleo Enterprise Edition solution, the User Sign In page is typically displayed.

On the Sign In page, users can select the language in which they want to use the application. If users change the default language on the Sign In page, the page is displayed in the new language and subsequent Oracle Taleo Enterprise Edition product pages are presented in that language. After selecting a language, users can also instruct the system to "remember" their selection so that the next time they sign in, the User Sign In page will be presented in the language they selected.

If single sign-on (SSO) is not enabled within an organization, users must enter a user name and password on the user Sign In page. The user name and password are provided by system administrators. Users can modify their password. If SSO was configured through a consulting engagement (which requires a statement of work (SOW)), the Sign In page is not displayed and the default language that was configured is used.

Once a user's credentials are accepted, the *Welcome Center* or table of contents page is displayed. The Oracle Taleo Enterprise Edition products available for use are dependent on which products were purchased by the organization and on the user's user type and permissions. If a user has permission to see only one Oracle Taleo Enterprise Edition product and the Display Welcome Center setting is set to "Yes", the product is displayed directly.

## Accessing an Application

You must have received a user name and password from your system administrator.

1. Select the language in which you want to use the application.
2. Enter your user name and password.
3. Click Sign In.

## Using the Forgot Password Link

Several methods are available to create a new password if the current one was forgotten.

The two main methods to recover a password are via an access code and security questions.

With the access code method, users are asked to enter their user name and email address. An email containing an access code is then sent to the users and the latter are prompted to enter a new password.

With the security questions method, users are asked to answer security questions (between 1 and 3) whose answers they provided beforehand. If the answers are correct, the users are prompted to enter a new password.

Other methods used to replace a forgotten password are: a combination of access code and security questions; contacting the organization's system administrator.

## The Welcome Center

The Welcome Center is the page displayed immediately after you sign in.

The Welcome Center is organized in these areas:

- The auxiliary navigation bar provides links to the online help and your personal setup options.
- The core navigation bar contains tabs to Oracle Taleo Enterprise Edition products.
- The Quick Access panel provides a "one-click" access to the same products available in the core navigation bar. It also provides access to specific content such as a requisitions and submissions.
- In the central panel, your organization can put information of interest to all product users.

## Home Page

The home page is the page that users see when they click the Legacy Recruiting tab.

The home page provides key information and links to underlying functionalities. The home page can be customized by system administrators to meet specific needs. Depending on the user signing in, the information displayed in the home page varies.

There are three default home pages:

- Recruiter
- Hiring Manager
- Hourly Manager

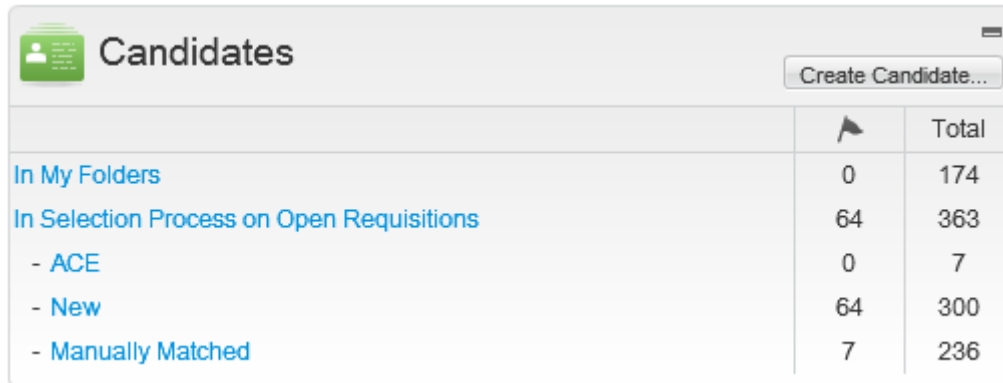
System administrators can modify these default home pages. They can also create brand new home pages or duplicate existing ones.

The home page can contain channels, links and lists.

Channels display status-oriented data about a user's activities. When clicking the links on the channels, users can access information on requisitions, candidates, or job offers. The following channels can be displayed:

- Candidates
- Offers
- Requisitions
- Tasks
- New Hire
- Pre-Hire





	▲	Total
<a href="#">In My Folders</a>	0	174
<a href="#">In Selection Process on Open Requisitions</a>	64	363
- <a href="#">ACE</a>	0	7
- <a href="#">New</a>	64	300
- <a href="#">Manually Matched</a>	7	236

A channel always includes a list of elements as well as the number of items associated to each element. The elements on the list are clickable and bring users to a more detailed area of the application, for example the candidate list, requisition list, etc. The elements on the list are also dependent on the value selected in the "Show information for requisitions" filter.

The number in the following two columns work as follows:

- The number in the Items Requiring Attention column (flag) is specific to you (not to your user groups). It represents the number of items that are new or have been updated by another user since you last viewed them. For example, if you approve your own requisition, a "new" task is added to your Ready for sourcing tasks, and the number in this column for Ready for sourcing element increases by one.
- The number in the Total column represents the total number of items including new, previously viewed, and updated. For example, if you choose your user name in the Show list and Ready for sourcing appears in the Tasks channel, the number in the Total column represents the total number of your requisitions that are ready for sourcing.

Channels are updated immediately after login, or when selecting the "Show information for requisitions" filter, or anytime a user returns to the home page, or when clicking the Refresh button.

Links redirect users to another part of the application. The following links are available:

- [Create a Requisition](#)
- [Search for candidates](#)
- [View Candidates](#)
- [View Requisitions](#)
- [Onboarding \(Transitions\)](#)



### Create a Requisition

Create a requisition for your job opening using a template or from scratch.

A mini requisition list can be available in the home page. This mini requisition list allows users to access a candidate list directly from the home page without having to go through the standard requisition list page. This mini requisition list

can contain up to four columns of summary information about each requisition, including the number of candidates. It can also display up to 30 requisitions (the ones with the most recent submission activity). This mini requisition list is used by default with the Hourly Manager home page.

The home page displays a Refresh button to allow users to update all the channels with the latest numbers. The Refresh button is only present when there is a channel that needs to be refreshed with dynamic content. For example, if only links are present on the home page, the Refresh button will not be present.

Information in the home page may be displayed as follows:

- Single column: Channels, links, and lists are displayed in one single column.
- Two columns: Channels, links, and lists are displayed in two columns. System administrators can choose which column and the order in which each widget will appear in that column.
- Two columns with header: Channels, links, and lists are displayed in either the header or one of the two columns, as specified by system administrators when placing the widgets.

## Getting Help

### Online Help

The Recruiting Center offers comprehensive help about concepts or tasks to perform.

The online help is available in the Help tab located in the supporting tools panel in the right-hand side of all pages. When clicking the Help tab, a table of contents of available help topics is displayed. It is also possible to search the help database to locate specific subjects.

### Online Clips

The Recruiting Center offers short clips describing essential user interface elements.

These online clips present basic information about the design, navigation, and certain features of the application. Each clip is no more than one minute in length to give users a quick way to get up to speed with how to use the product.

When online clips are enabled, they are available in the Clips tab located in the supporting tools panel in the right-hand side of all pages.

Default online clips come with the product. Oracle reserves the right to add new online clips, modify existing clips, or delete clips at any time without notice to customers. The tab where these online clips are available is configurable. Organizations may choose to disable the tab or replace the content with their own content linking to alternative learning materials for their end users.

## Communications Channel

The Communications tool allows the display of useful information to Recruiting Center users.

The Communications tool is available in the supporting tools panel in the right-hand side of the home page. The Communications tool provided by default contains three sections, each being expandable and collapsible.

- Documentation Center: Contains a link to the latest What's New which provides information on new features. A link to Customer Connect is also available.
- Resource Center: Contains a link giving access to information about the hiring cycle, articles, research content, and more.
- Support: Contains information to contact Oracle Support.

## Tooltip

A tooltip is a short, explanatory text which appears when "hovering" a mouse over a button, a link, a table cell heading or icon without clicking it.

Tooltips are available throughout the system and they give additional information about an action before performing it. Tooltips are provided for buttons, links, icons, and table header cells. These tooltips are not configurable. However, for screening services, the system administrator can create tooltips for some types of user-defined fields.

## Release Notes Message

A pop-up message containing new release information, system improvements, important messages and other information can be displayed when users log into the product.

The same release notes message is displayed to users regardless of the product.

Once users are logged in, they can turn off the Release Notes message by selecting the *Don't display this message again* option. The message will then reappear only when new release information or other important information is available or if the users clear their browser cookies.

## Navigation Tools and Page Layout

### Auxiliary Navigation Bar

The auxiliary navigation bar is the bar located at the top right of pages. If enabled, the auxiliary navigation bar is available at all times for users to see and access.

The content of the auxiliary navigation bar varies depending on the features enabled and permissions granted to users to access those features.

Element	Description
Home	<ul style="list-style-type: none"> <li>• If you have access to multiple Oracle Taleo Enterprise Edition products and you click Home, the Welcome Center is displayed.</li> </ul>

Element	Description
	<ul style="list-style-type: none"> <li>If you have access to Recruiting only and you click Home, the Recruiting Center front page is displayed.</li> </ul>
Resources	<p>May include:</p> <ul style="list-style-type: none"> <li>My Setup: Access to personal preferences.</li> <li>Training: Access to online training materials.</li> <li>e-Learning: Access to eLearning materials.</li> <li>Support: Access to Oracle Support.</li> <li>Help: Access to online help.</li> <li>About: Information about the product such as the version number and the build number that you need to provide to Oracle Support when you need to contact them.</li> </ul>
Talent Grid	Provides access to Solution Exchange and Knowledge Exchange.
Sign Out	Terminates the session and you are automatically signed out of all products.

## Core Navigation Bar

















The core navigation bar provides access to specific recruiting features. It is located just above the central panel. If enabled, the core navigation bar is available at all times for users to see and access.

















The table presents elements that may be available in the core navigation bar (if they were enabled and users were granted access to them):


















Element	Description
Home	If your organization has multiple Oracle Taleo Enterprise Edition products, clicking the Home icon displays the Welcome Center. If your organization has no other Oracle Taleo Enterprise Edition products apart from Recruiting, clicking the Home icon displays the Recruiting Center. The arrow provides direct links to products as well as to specific modules within the products.
Recruiting	Access to the Recruiting Center main page.
Tasks	Access to the Tasks list.
Requisitions	Access to the Requisitions list.
Candidates	Access to the Candidates list.
Offers	Access to the Offers list.
Reports	Access to reports previously generated and reports that can be generated.
Libraries	Access to requisition templates, questions, disqualification questions, competencies, evaluation categories, evaluation questions, evaluation skills, evaluation questionnaires.



## Recruiting Center Icons

The table presents icons available in the Recruiting Center.

Icon	Description
	Displays the previous page.
	Goes to the previous 10 pages.
	Displays the next page.
	Goes to the next 10 pages.
	Draws a user's attention to items that they own and that require viewing.
	Indicates a new or modified item.
	Indicates that the Disqualification Questions functionality is enabled.
	ACE Candidate icon. Identifies top candidates, those who meet all required criteria.
	Indicates the most advanced progression status of a candidate on other requisitions across all positions where the candidate is being considered.
	Indicates that a candidate is in at least one selection process.
	Indicates that a file was attached.
	Indicates that the candidate is internal, that the candidate already works for your organization.
	Indicates that the candidate was referred by a colleague.
	Indicates that the candidate is new in the selection process.
	Indicates the number of candidates who applied on a requisition.
	Indicates a registered person file. The Registered Person icon is also known as the Ghost icon. A registered person is created in the following circumstances: <ul style="list-style-type: none"> <li>A candidate creates a user name and password on a career section and signs out immediately. This candidate would show as <i>Identification Missing</i>.</li> <li>A candidate creates a user name and password on a career section and provides some personal information via My Account Options instead of providing the information via an application flow.</li> </ul>

Icon	Description
	<ul style="list-style-type: none"> <li>• An unknown candidate makes a referral.</li> <li>• A referred candidate has not completed the action of applying for the job referred to.</li> <li>• A user with an SSO ID accesses an SSO internal career section but does not have a candidate account.</li> <li>• When using the career section preview functionality, if the SSL security setting is enabled, the user will be automatically signed in on the career section. If the user does not have a candidate profile, the system will create one.</li> </ul> <p>To remove the Registered Person icon:</p> <ul style="list-style-type: none"> <li>• Have the candidate complete the general profile application flow from a career section. Or,</li> <li>• Have the candidate complete a job-specific application flow from a career section. Or,</li> <li>• Capture the candidate in the Recruiting Center.</li> </ul>
	Indicates the number of candidates who received a job posting notification.
	Indicates that a requisition requires the recruiter/hiring manager's immediate attention.
	Prevents users from posting a requisition.
	Indicates that the daily recruiting report function has been activated for that requisition.
	List format configuration.
	Online help.
	Clips
	Indicates a comment.
	Print function.
	Filtering section.
	Folder management section.
	Talent pool section.
	Calendar.
	Add comments.
	File in a folder.
	Find similar candidates.

Icon	Description
	Match candidates.
	Merge candidate files.
	Share information about a candidate.
	Candidate referred by an agent.
	Diagnostic tool for requisitions.
	Duplicate a requisition.
	Save requisition as a template.
	Create a search query based on a requisition.
	Delete a requisition.
	Changes the candidate's status to the next appropriate status.
	Changes the candidate's status to Rejected.
	Changes the candidate's status to Under consideration.
	Candidate progression status - New
	Candidate progression status - Reviewed
	Candidate progression status - First Interview
	Candidate progression status - Second Interview
	Candidate progression status - Third Interview
	Candidate progression status - Testing
	Candidate progression status - Offer
	Candidate progression status - Hired

Icon	Description
	Candidate progression status - Pipeline
	Candidate progression status - Contact

## Personal Preferences

### Personal Preferences

Recruiting Center users can set certain elements of the application according to their personal preferences.

Users can set personal preferences such as personal information, contact information (address, email), password, person to whom tasks can be delegated, frequent collaborators, frequent approvers, display preferences. Users can also override options that were previously configured by the system administrator to fit their personal preferences.

Personal preferences are set in My Setup, which is available under the Resources link in the auxiliary navigation bar. For a list of options that can be modified, see *Personal Preferences Options*.

### Personal Preference Options

The table presents options and preferences that can be modified in the My Setup page.

Element	Description
<b>General</b>	
Personal Information	<ul style="list-style-type: none"> <li>• Prefix</li> <li>• First Name</li> <li>• Middle Name</li> <li>• Last Name</li> <li>• Suffix</li> <li>• Employee ID</li> <li>• Title</li> <li>• Department Name</li> </ul>
Contact	<ul style="list-style-type: none"> <li>• Email address</li> <li>• Work Phone Number</li> <li>• Cellular Phone Number</li> <li>• Home Phone Number</li> </ul>








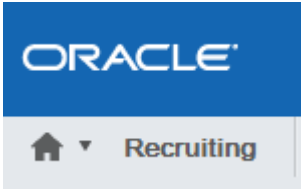
Element	Description
	<ul style="list-style-type: none"> <li>• Fax Number</li> <li>• Pager Number</li> </ul>
Address	<ul style="list-style-type: none"> <li>• Address</li> <li>• State/Province</li> <li>• Zip/Postal Code</li> <li>• Country</li> </ul>
Account	<ul style="list-style-type: none"> <li>• User Name</li> <li>• Password</li> <li>• Delegate button: Allows you to delegate tasks to another user.</li> </ul>
<b>Preferences</b>	
General	<ul style="list-style-type: none"> <li>• Integration Profile Type: Restricted user, internal user, unrestricted user</li> <li>• Enable eShare Email for Response Center Access</li> <li>• Default Distance Unit: Miles or kilometers.</li> <li>• Content Language: The language used when creating an entity such as a requisition.</li> <li>• Correspondence Language: The language used for email messages.</li> <li>• Time Zone</li> <li>• Workflow Event Notification</li> <li>• Fax Notification</li> <li>• Default Theme</li> <li>• Default Text Size</li> <li>• Selected Item Color</li> <li>• Accessibility Features</li> </ul>
Search	<ul style="list-style-type: none"> <li>• Last Update</li> <li>• Place of Residence</li> </ul>
Candidates	<ul style="list-style-type: none"> <li>• Identifier Content: This is used to specify which candidate-specific information is presented in the Candidate column of candidates lists</li> <li>• Sorting Key</li> <li>• Display candidates on first CSW step</li> <li>• Candidate List Content: By default, only shows candidates that are in selection process, if relevant.</li> <li>• Tab displayed when accessing a candidate file in navigation</li> <li>• Tab displayed when accessing a candidate file from a list</li> </ul>
Requisitions	<ul style="list-style-type: none"> <li>• Default Hiring Manager</li> <li>• Default Recruiter</li> <li>• Requisition File Automatic Filling</li> <li>• Preferred Non-Electronic Media</li> </ul>

Element	Description
	<ul style="list-style-type: none"> <li>• Display Question Details in Libraries</li> </ul>
<b>Frequent Collaborators</b>	
Frequent Collaborators	<ul style="list-style-type: none"> <li>• Individuals who are frequently requested to act as collaborators.</li> </ul>
<b>Frequent Approvers</b>	
Frequent Approvers	<ul style="list-style-type: none"> <li>• Individuals who are frequently requested to approve requisitions and offers.</li> </ul>

## Color Theme

The theme is the color used for the core navigation bar in Oracle Taleo Enterprise Edition products.

The table presents the available color themes.

Taleo	
Aqua	
Sand	
Ice	
Silver	
Skyros	

The Skyros theme is available for Oracle Taleo Enterprise Edition products. The Skyros theme is the default theme for new customers. The Skyros theme provides a blue header. Because of the blue header, organization logos that have a white background are not recommended for use with this theme.

A default theme is selected by system administrators. However, Recruiting Center users can modify the default theme in their user preferences (Resources > My Setup > Preferences tab).

## Selected Item Color

Color displayed when selecting elements in the user interface.

The following colors are available:

- Green
- Soft blue (default)
- Yellow
- Blue (inverted)
- Dark (inverted)

The Dark (inverted) color is a high contrast color scheme for visually impaired users.

A default color is selected by system administrators. However, Recruiting Center users can modify the default color in their user preferences (My Setup > Preferences tab).

## Screen Resolution

The recommended screen resolution for the page layout is 1024 x 768.

To hide or show the right or left pane, users simply have to click the Hide/Show Supporting Tools icon available in the corresponding pane.

## Languages

### Understanding Languages

Oracle Taleo Enterprise Edition products are available in different optional languages.

Not all languages are available for all Oracle Taleo Enterprise Edition products. Languages must be activated by the system administrator before they can be used in an application.

There are several concepts around languages:

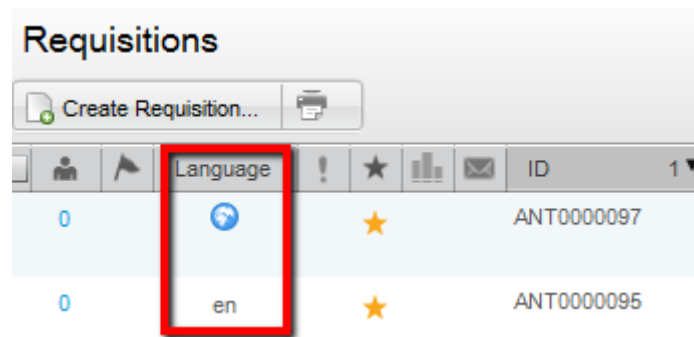
- The application language is the language used for a product. This is the language selected by the user when signing in the Oracle Taleo Enterprise Edition suite. The language selected defines the language of every UI labels and elements of the product.
- The content language is the language of a specific entity. The content language is selected when creating an entity. For example, it is possible to create a requisition in French even when using the Recruiting Center in English. The content language of a user is set in the user's account by the system administrator. However, a user can change this default content language under My Setup > Preferences > Content Language. The preferred content language is used by the system as the default content language which is the same across all

Oracle Taleo Enterprise Edition products. If a product does not support the same set of content languages, it will have its own preference configuration.

- The correspondence language is the language used for email messages. The correspondence language of a user is set in the user's account by the system administrator. However, a user can change this default correspondence language under My Setup > Preferences > Correspondence Language.

In Oracle Taleo Enterprise Edition products, the languages in which an element (for example, a requisition) is available are indicated in the Activated Languages field. When creating or editing an element, the user can choose a base language as well as languages in which the element will be available. The base language of an element is the item's reference language, usually used as a reference for other languages or fallback display in list mode. The user's preferred content language is used as the default base language when the user creates an element. The base language of an element can be changed at any time by the user. A language must be activated before it can be designated as a base language.

When an element is available in one language, the name of the language is displayed in the list; for example "en". When only one language is used within a company, there is no special indicator. When an element is available in several languages, the Earth icon is displayed. Hovering the mouse over the icon displays the languages in which the element is available.



## Setting My Preferred Content Language

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

1. In the auxiliary navigation bar, click Resources, then My Setup.
2. In the Preferences tab, click Edit.
3. Select the desired language in the Content Language drop-down list.
4. Click Save.

When creating a requisition or candidate file, the file will be created in the selected preferred language.

## Setting My Preferred Correspondence Language

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

1. In the auxiliary navigation bar, click Resources, then My Setup.
2. In the Preferences tab, click Edit.
3. Select the desired language in the Correspondence Language drop-down list.
4. Click Save.

When creating a message, the message will be created in the selected correspondence language.

## Selecting the Base Language

Language must be active.

If only one language is activated, the base language option is not displayed.

1. Edit an element.
2. In the Activated Languages drop-down list, select Configure.
3. Select the Base option for the desired language.
4. If necessary, select Active in the Status drop-down list.
5. Click Save.

The word Base appears next to the language in the Activated Languages drop-down list.

## Activating Languages for an Element

1. Edit an element.
2. In the Activated Languages drop-down list, select Configure.
3. Select one or several language.
4. For each language, select Active in the Status drop-down list.
5. Click Save.

Activated languages will be displayed in the Activated Languages drop-down list.

## Deactivating a Language

The element must be in Edit mode and the language must not be the base language.

1. Open an element.
2. Select Configure next to the Language drop-down list.
3. For each language, select Not Used in the Status drop-down list.

If the language to deactivate is the Base language, you will need to select another active language as the base language.

4. Click Save.

Selected languages no longer appear in the Language drop-down list of the element.

## Supported Languages

The languages supported for Oracle Taleo Enterprise Edition products as well as specific features are listed below. For details regarding language availability for Oracle Learn Cloud and Oracle Taleo Business Edition, see the documentation for those products.

- **Scheduling Center:** All listed languages are supported except Portuguese (Portugal).
- **Assessment:** All listed languages are supported except Indonesian (Bahasa).
- **OBIEE:** All listed languages are supported except Indonesian (Bahasa), Lithuanian, Malaysian (Malay), Serbian, Slovenian.
- **Resume Parsing:** Resume parsing is delivered using a third party partner service. The functionalities are delivered as is. Customers needing additional or different resume parsing capabilities should explore partner services.

Language	Locale	Recruiting and Onboarding	Performance	Mobile	Sourcing	Resume Parsing
Bulgarian	bg	Available	Available			
Chinese (China)	zh_CN	Available	Available	Available	Available	
Chinese (Taiwan)	zh_TW	Available	Available	Available	Available	
Croatian	hr	Available	Available			
Czech	cs	Available	Available		Available	
Danish	da	Available	Available			
Dutch	nl	Available	Available	Available	Available	Limited
English	en	Available	Available	Available	Available	Supported
English (U.K.)	en_GB	Available	Available	Available	Available	Supported
Finnish	fi	Available	Available		Available	
French (Canada)	fr	Available	Available	Available		Limited
French (France)	fr_FR	Available	Available	Available	Available	Limited
German	de	Available	Available	Available	Available	Limited
Greek	el	Available	Available			
Hungarian	hu	Available	Available		Available	
Italian	it	Available	Available	Available	Available	Limited
Indonesian (Bahasa)*	in	Available	Available	Available		
Japanese	ja	Available	Available	Available	Available	
Korean	ko	Available	Available	Available	Available	

Language	Locale	Recruiting and Onboarding	Performance	Mobile	Sourcing	Resume Parsing
Lithuanian*	lt	Available	Available			
Malaysian (Malay)*	ms	Available	Available			
Norwegian	no	Available	Available		Available	
Polish	pl	Available	Available	Available	Available	
Portuguese (Brazil)	pt_BR	Available	Available	Available	Available	Limited
Portuguese (Portugal)*	pt	Available	Available		Available	
Romanian	ro	Available	Available		Available	
Russian	ru	Available	Available	Available	Available	
Serbian*	sr (sh)	Available	Available			
Slovak	sk	Available	Available		Available	
Slovenian*	sl	Available	Available			
Spanish (Worldwide)	es	Available	Available	Available	Available	Limited
Swedish	sv	Available	Available	Available	Available	
Thai	th	Available	Available		Available	
Turkish	tr	Available	Available		Available	

## Lists and Filters

### List Usage

Several tools are available to manage requisition and candidate lists.

**List Filtering:** Several filters are available to filter information in a list:

- *quick filters*: filter a list according to selected criteria.
- *advanced filters*: filter a list using an expansive set of filtering criteria.
- *show filters*: filter a list using ownership, collaboration or status criteria.

**Actions Directly in the List:** Several actions can be performed directly in a list. A contextual action menu is available in the Requisitions list, Requisition Templates list, and Candidates list. To display the list of actions, users simply have to click the Access Contextual Actions icon next to the file title. See *Actions Available Directly in a List*.

**Column Sorting:** Columns in a list are sortable by clicking on the column header. Columns made of a user-defined field are also sortable. An up or down arrow is displayed in the column header to indicate a descending or ascending sorting order.

**Column Drag and Drop:** Columns in a list can be moved on the page using a drag and drop action. Changes in columns are kept during the user's session.

**Column Width:** It is possible to enlarge or reduce the width of columns in lists. Changes in columns are kept during the user's session.

**Wrapped Text:** Text is wrapped in every column, except for the Candidate Record Identifier column.

**Column Header and Row Colors:** When a cursor passes over a column header or column row, the element is highlighted in light blue. When clicking on a column header to sort elements or when selecting one or several rows, the elements are highlighted with a dark color.

**Candidate Count Column:** The Candidate Count column indicating the number of candidates who applied on a requisition is available on the left of the list to make it easier and faster for users to get to the list of candidates.

**Callouts:** A callout is a small window or bubble containing information on an element. To see information contained in a callout, users must place their mouse over the element. See *Callout*.

**Candidate Bulk Actions:** The following actions can be performed for 1000 candidate files at a time:

- All candidate selection workflow actions such as move, change step and status, add comments, enter grade, revert, bypass, reject candidate, candidate has declined, hire, etc.).
- All queue and route actions.
- Delete and undelete.
- Start and/or cancel Onboarding (Transitions) processes such as New Hire or Pre-Hire processes.
- Share.
- Match.

The share and match bulk actions are delayed scheduled actions if the following requirements are met:

- For the Share action if  $(\text{number of candidates}) * (\text{number of recipients}) \geq 10$ .
- For the Match action if  $(\text{number of candidates}) * (\text{number of requisitions}) \geq 10$ .

When the action is delayed, a new task is scheduled for immediate execution. The execution of the action depends on the scheduler's load. As a general rule, the action is executed a few minutes after the task is created.

The processing of actions by the system is done in groups of 20 and is committed within that group of 20.

For example, if a recruiter wants to hire 21 candidates on a requisition and the requisition only has 20 positions available, the system will hire the first 20 candidates and commit the data. Once candidate 21 is processed, the system will display a message indicating that the last candidate cannot be hired because there is no positions available. If the recruiter wants to undo the first 20 hired transactions, the recruiter will have to do it manually.

The Send Correspondence is limited to 150 candidates at a time. For the Print action, a maximum of 50 candidate files and 15 requisition files can be printed at a time.

**Maximum Number of Rows Displayed in a List:** To maintain good performance, a limit has been set to display results in a list.

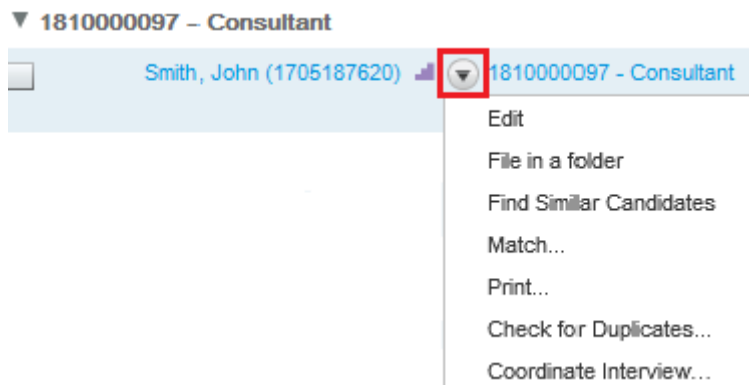


	Maximum number of rows returned	Results displayed if the maximum number of rows returned is exceeded	Results are sorted if not all rows can be displayed	Scrollbar available
Requisitions List	1000	Yes (but, no indication that the results exceeded the limit)	Yes. A system sort is applied using the last modification date. The user can then perform a sort on the 1000 requisitions.	Yes
Candidates List	1000	No (but a message indicates to filter the list)	No	Yes
Job-Specific Candidate List	1000	No (but a message indicates to filter the list)	The user can perform a sort.	Yes
Automatic Candidate Pooling List	300	Yes (but, no indication that the results exceeded the limit)	No	Yes
Advanced Search Results List	300	Yes (but, no indication that the results exceeded the limit)	No	Yes
Offers List	1000	No (but a message indicates to filter the list)	No	Yes
Selectors (such as Organizations, Locations, Job Fields, Employers, Institutions, etc.)	1000	Yes (but, no indication that the results exceeded the limit)	Alphabetical sort	Yes

## Actions Available Directly in a List

Recruiting Center users can take actions on files directly from a list without having to open the file first.

These actions are available using the Access Contextual Actions icon next to the file title.



Actions available for the candidate files, requisition files and requisition templates are listed in the table.

Actions for Candidate File	Actions for Requisition File	Actions for Requisition Template
Edit	Add Comments	Edit
File in a folder	Allow Posting	Create Requisition...
Find similar candidates	Amend Approval Path	Duplicate this template
Match...	Cancel Requisition	Print...
Print...	Create Requisition...	
	Decide on Approval	
	Delete	
	Duplicate this requisition	
	Edit	
	Fill	
	Posting and Sourcing...	
	Prevent Posting	
	Print...	
	Put on Hold	
	Reactivate	
	Reopen Requisition	
	Request Approval	
	Request Approval Path Amendment	
	Request Contribution	
	Request Sourcing Configuration	
	Return my Contribution	
	Save as Open	
	Send an approval request reminder	
	Terminate Approval Process	

## Candidate Lists Exceeding 1000 Candidates

In a job-specific candidate list, the list filtering capabilities can handle mass applicant volumes.

When viewing candidates who applied on a requisition, if more than 1000 candidates match the filter(s) selected, Recruiting Center users are prompted to narrow down the list. Two solutions are available:

- use quick filters to narrow down the list of candidates, or
- choose the "View First 1000 Candidates" option.

When selecting the "View First 1000 Candidates" option, the user is brought to the list of candidates and the first 1000 candidate files are displayed. Candidates will be presented initially in descending order, beginning with the candidate who most recently applied. Anytime a new quick filter criterion or list sort action is applied, the list will refresh considering the entire set of applicable candidates. In the case of list sorting, this means a different list of 1000 candidates may be returned. In the case of applying filters, this link may or may not appear again depending on whether the list is still greater than 1000 candidates. To view the entire list, use the Step/Status filters and disposition candidates out of the quick filter view being used. This way the entire list can be accessed and reviewed.

When using the "View First 1000 Candidates" option, users should place candidates into a Step/Status other than New/New so that they can continue to access the first 1000 new files using this feature by reapplying the filter and continuing to successively go through the list.

If needing to reject more than 1000 candidates at one time, users should not put them all into the Rejected status and then try to perform this action because the list will not easily render. Instead, if sending manual reject correspondence, users should send them prior to putting candidates into the Rejected status.

**Note:** Users cannot use advanced filters until there are at least some candidates displayed in the list. Therefore, advanced filters cannot be used to do the initial list filtering.

Prerequisites to this feature are:

- More than 1000 candidates have applied on a requisition.
- Quick filters in use do not narrow the list below 1000 candidate files.

This feature is only available for job-specific candidate lists. It does not apply to:

- Search results: This view shows a maximum of 300 candidates.
- Folders: When more than 1000 files exist, users need to use quick filters to narrow down the list.
- Candidates List: When more than 1000 files exist, users are prompted to narrow down the list. Users can use quick filters, or they can view candidates that applied on specific requisitions (one requisition at a time), or they can use the advanced search or quick search if looking for a specific candidate.

## Candidate File Identifier

The candidate file identifier is used to specify which candidate-specific information is presented in the Candidate column of candidates lists.

The candidate file identifier can provide the following information in the form of text or icon:

- Candidate name (first name, last name, middle initial)
- Identification number
- Ace Candidate icon
- Internal Candidate icon
- In Selection Process icon
- Referred Candidate icon

The Candidate column is always displayed in candidates lists. System administrators are responsible of defining which information will appear by default in this column. However, Recruiting Center users can modify the default set by their system administrator via their personal preferences available under My Setup.

## List Formats

List formats allow the display of candidate and requisition information within columns.

Default candidate and requisition list formats are provided with the application. However, system administrators can create new list formats to better suit their organization needs.

List formats are available in the List Formats page. Recruiting Center users can select (among the list formats made available by their system administrator) the list format they wish to use to display candidate and requisition information. They can also create up to three list formats and select columns to display specific information (if permissions were granted). Columns available to choose from have been previously defined by system administrators.

## Creating a Personalized List Format

A user type permission grants users access to this feature.

1. In the Requisitions or Candidates list, click the List Format Configuration icon.
2. Click the Edit icon next to Personal Format 1, 2 or 3.
3. Provide a name for the list format.
4. Select the check box next to the columns you want to activate.
5. Specify how you want files to be sorted.
  - a. To select one sort criterion, click in the Sort By column next to the desired column name.
  - b. To select a second sort criterion, click in the Then By column next to the desired column name.
  - c. To select a third sort criterion, click in the second Then By column next to the desired column name.
  - d. To select ascending or descending sorting order, click the triangle icon repeatedly.
  - e. To disable sorting for a specific column, click the triangle icon again. The triangle icon disappears.
  - f. To modify the order of the columns selected, use the arrows.
6. Click Save.

## Editing a Personalized List Format

A user type permission grants users access to this feature.

1. In the Requisitions or Candidates list, click the List Format Configuration icon.
2. Select a personal format then click the Edit icon.
3. Make necessary changes.
4. Click Save.

## Deleting a Personalized List Format

A user type permission grants users access to this feature.

1. In the Requisitions or Candidates list, click the List Format Configuration icon.
2. In the List Formats window, select a personal list format then click the Delete icon.

## Changing the Candidate List Sorting Key

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

1. Click My Setup located in the Resources drop-down list of the auxiliary navigation bar.
2. Click the Preferences tab.
3. Click Edit.
4. Select the desired value in the Sorting Key drop-down list.
5. Click Save.

## Quick Filters

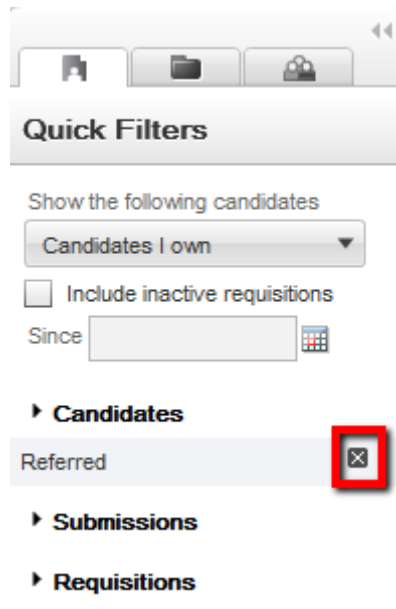
Quick filters help Recruiting Center users to quickly filter a list down to relevant information.

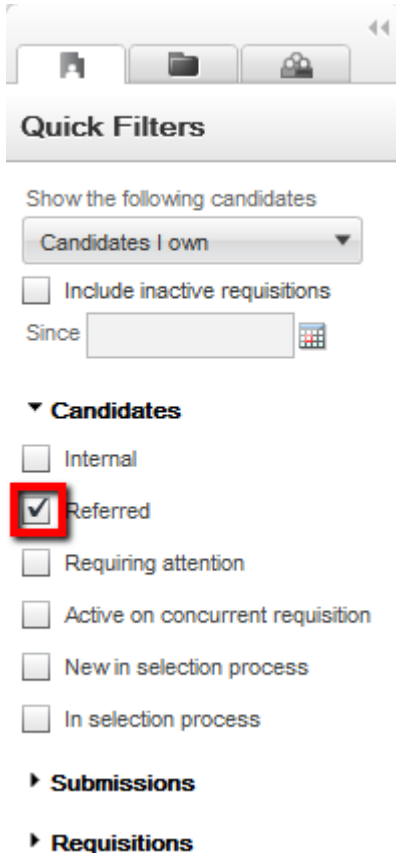
Quick filters are displayed on the left panel of a page and are available in the following lists:

- Tasks
- Requisitions
- Candidates
- Offers
- Requisition Templates
- Questions
- Interview Questions
- Disqualification Questions
- Competencies

- Evaluation Categories
- Evaluation Questions
- Evaluation Questionnaires

By default, quick filter categories are collapsed and only display selected filtering criteria. When a filter category is collapsed, you can remove a criterion by clicking the Remove icon to the selected criterion. When a filter category is expanded, you can remove a criterion by clearing the criterion.





Quick Filters

Show the following candidates

Candidates I own

Include inactive requisitions

Since

▼ **Candidates**

Internal

Referred

Requiring attention

Active on concurrent requisition

New in selection process

In selection process

► **Submissions**

► **Requisitions**

When no quick filter is selected, the list displays all available entries. As soon as one filter is selected, it is automatically applied to the list and the list refreshes according to the selection made. Users do not need to refresh the list. For example, in the Requisitions list, if the "Status - Open" quick filter is selected, only open requisitions are displayed in the list.

Several quick filters can be applied at a time. Some quick filters have a Refresh icon to refresh the related list. Also, when entering data in more than one field and clicking the Refresh icon or pressing the Enter key, the refresh action takes into account the data entered in all the fields.

**Note:** When applying Organization, Location or Job Field quick filters, select the desired value and then click into another field in the quick filter area to get the list to refresh with the criteria applied.

## Quick Filters in the Requisitions List

Quick filters are available in requisitions lists and mini requisitions lists.

Quick filters in the requisitions list:

- Primary Location
- Organization
- Job Field

- Status
- Requisition Title

**Note:** The Status quick filter is considered a multi-select within the same field and acts as an OR filter. For example, when selecting the Draft and Open status filters, the user will see all requisitions that are either in Draft or Open status.

Quick filters in the mini requisitions list:

- Primary Location
- Organization
- Job Field

## Quick Filters in the Candidates List

The table presents the quick filters available in different candidates lists.

Quick Filter	All Candidates by Requisition	All Candidates By Folder	All Candidates By Offer	Requisition Specific Candidate List	Search Results - Quick or Advanced	List of automatically pooled candidates
Candidates - Internal	Yes	Yes	Yes	Yes	Yes	Yes
Candidates - Referred	Yes	Yes	Yes	Yes	Yes	Yes
Candidates - Requiring Attention	Yes	Yes	Yes	Yes	Yes	
Candidates - In selection Process	Yes	Yes				
Candidates - Active on Current Requisition	Yes			Yes		
Candidates - Active on concurrent requisition	Yes			Yes	Yes	Yes
Candidates - Exclude disqualified	Yes			Yes		
Candidates - New in selection process	Yes			Yes		
Submissions - Submission completed	Yes			Yes		



Quick Filter	All Candidates by Requisition	All Candidates By Folder	All Candidates By Offer	Requisition Specific Candidate List	Search Results - Quick or Advanced	List of automatically pooled candidates
Submissions - Meet required criteria	Yes			Yes		
Submissions - ACE	Yes			Yes		
Submissions - Assets Met	Yes			Yes		
Submissions - Results between %	Yes			Yes		
Submissions - Creation Date	Yes			Yes		
Submissions - Completion Date	Yes			Yes		
Submissions - Last Activity Date	Yes			Yes	Yes	Yes
Submissions - Step	Yes			Yes		
Submissions - Status	Yes			Yes		
Submissions - Employer	Yes	Yes		Yes	Yes	
Submissions - Program	Yes	Yes		Yes	Yes	Yes
Submissions - Radius						Yes
Requisitions - Status	Yes					
Requisitions - Organization	Yes					
Requisitions - Primary location	Yes					
Requisitions - Job Field	Yes					
Requisitions - Requisition ID	Yes					
Folder Name		Yes				
Offer Status			Yes			
Shift					Yes	Yes
Offer Dates: Creation, Start, Approval,			Yes			

Quick Filter	All Candidates by Requisition	All Candidates By Folder	All Candidates By Offer	Requisition Specific Candidate List	Search Results - Quick or Advanced	List of automatically pooled candidates
Expiration & Acceptance						

**Note:** Candidates quick filters are considered a single select on different fields and the AND operator is used between filters. For example, when selecting the "Internal" and "Referred candidate" filters, the user will only see the candidates that are both Internal and Referred.

**Note:** The Candidates - Active on Current Requisition filter will display any candidates in an active step/status (excluding any that are in a rejection, decline, or in hire step/status). The Candidates - In selection Process filter will display any candidates in an active step/status (excluding any that are in a rejection, decline, or in a hire step/status) and not flagged as disqualified based on disqualification questions.

## Quick Filters in the Offers List

Quick filters are available in the offers list.

Quick filters in the offers list:

- Status
  - Accepted
  - Approval in Progress
  - Approval Rejected
  - Approved
  - Canceled
  - Draft
  - Extended
  - Has Declined
  - In Negotiation
  - Offer to be made
  - Refused
  - Rejected
  - Reneged
  - Rescinded
- Creation Date
- Start Date
- Approval Date
- Expiration Date
- Acceptance Date
- Candidates

- Internal
- Referred
- Requiring attention
- Most advanced progression status

## Quick Filters in the Tasks List

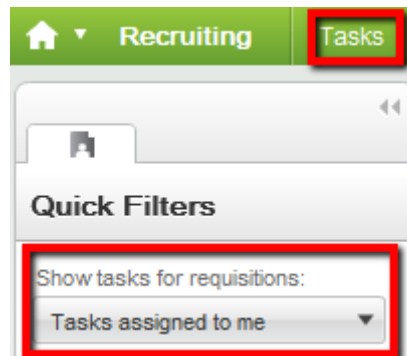
The table presents quick filters available in the Tasks list.

Quick Filter	Description
Requiring attention	Displays tasks that have the Item Requiring Attention icon. Self-assigned tasks are the only type of tasks that do not have an Item Requiring Attention icon because it is always the assignee who creates the task.
Hide completed tasks	Removes tasks that have the Completed status.
Due date	Displays tasks for which the due date matches the selected value (All, Next Week, Today, Overdue). When the option "Exclude task without due date" is selected, tasks without a due date will not appear in the list.
Task type	Displays the type of task selected. If no task type is specified, all task types appear in the list.
Related to Candidate	Displays tasks related to the selected candidate.
Related to Requisition	Displays tasks related to the selected requisition.
Related to Assignee	Displays tasks related to the selected user.

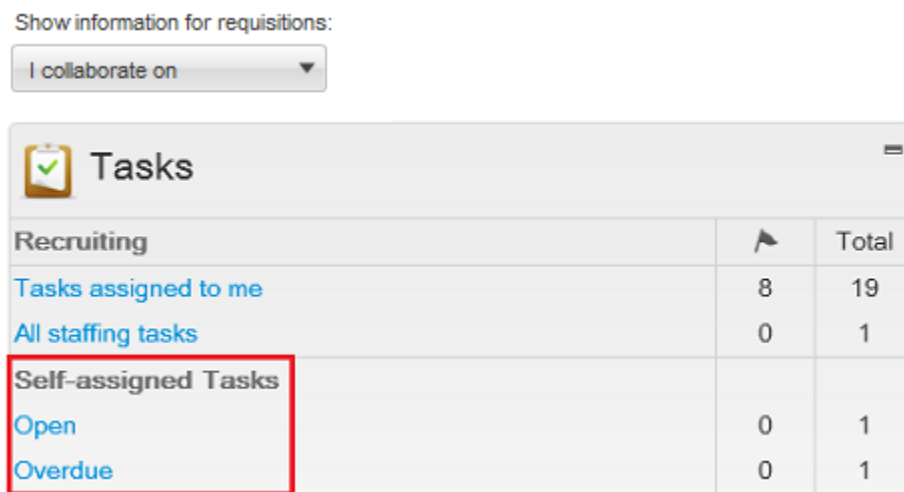
### "Tasks assigned to me" filter

The "Tasks assigned to me" filter was created to eliminate the confusion of mixing tasks that users own with tasks that users might not own, but are for requisitions they own.

The "Tasks assigned to me" filter is available in the Tasks list and Tasks channel. In the Tasks list, the filter is available in the "Show tasks for requisitions:" drop-down menu. It is the default value when accessing the Tasks list. In the Tasks channel, the "Tasks assigned to me" link brings users to the Tasks list which displays tasks assigned to them.



In the Tasks channel, when a task is clicked under Self-assigned Tasks, users are brought to the Tasks list. The "Tasks assigned to me" value in the Tasks list is selected by default no matter what the "Show the following information" filter on the home page is set to.



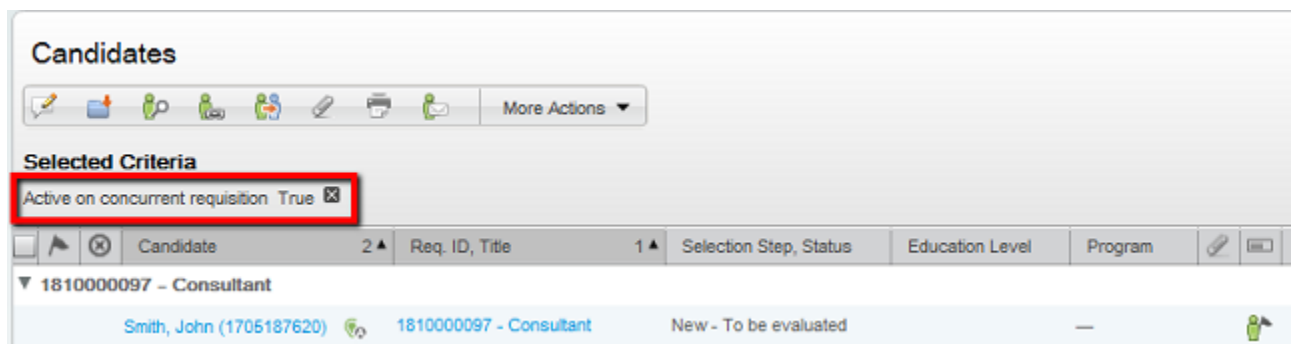
In the Tasks channel, when a task is clicked under Requisitions, Candidates, Offers, etc., users are brought to the Tasks list and the value in the "Show tasks for requisitions:" filter is identical to the value selected in the "Show information for requisitions:" filter of the home page. Example: If "I own" is selected in the home page, then "I own" will be selected by default in the "Show tasks for requisitions:" filter of the Tasks list. If a group is selected in the "Show information for requisitions:" filter on the home page, then the same group will be selected in the Tasks list.

**Note:** The *Default Value for the Show Information Filter* setting that can be set in a configuration profile has no effect on the Tasks list view and the Tasks channel view.

## Advanced Filters

Advanced filters help Recruiting Center users to filter lists using an expansive set of filtering criteria.

Both requisitions and candidates lists have an Advanced Filters button in the left panel, at the very bottom of the Quick Filters panel. Recruiting Center users can select several advanced filter criteria to filter a list. Once criteria are selected, the criteria are presented to the user across the top of the screen with a Remove icon next to the criteria. When clicking the Remove icon, the criteria is removed and the list is dynamically updated according to the updated criteria set. User-defined fields can also be available as filtering criteria.



Advanced filters are filtering on an already filtered list, that is whatever advanced filter criteria is selected, the list will be filtered based on what is already displayed in the list.

Example: A user filters a requisitions list using the "Pending", "Open" and "On Hold" status quick filters (he does not select the Draft status filter). The user then applies the advanced filter "Status Details/Draft". The list will display "No matches found". In this example, the system first displays all requisitions except Draft ones. Then, from the results displayed by the quick filters, the system finds those requisitions that are draft.

When using advanced filters for which words must be entered, users can enter partial words. For example, a user could filter a candidate list with candidates whose first name starts with "cath". The system would retrieve candidates whose first name is "cathy", "catherine" or "cathia".

### Advanced Filter - Keyword

When using the Keyword advanced filter in a requisitions list, the system looks through this content of the requisition file:

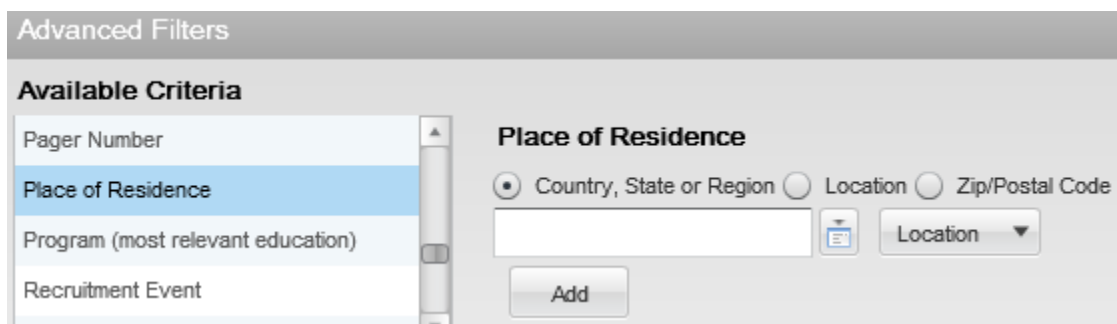
- Requisition number
- Requisition title
- Requisition title by manager
- Requisition internal description
- Requisition external description
- Job board summary description
- Internal qualifications
- External qualifications

- Abstract
- Additional information
- Department
- Position
- Requisition/Job Information UDF
- Offer UDF
- Department UDF

## Filtering Candidates Based on their Place of Residence

Recruiters can filter a list of candidates based on the distance between the candidate's place of residence and a central point, either a zip/postal code or a location.

The Place of Residence advanced filter is available for candidate lists and requisition-specific candidate lists.



The screenshot shows the 'Advanced Filters' interface. On the left, under 'Available Criteria', 'Place of Residence' is selected. On the right, under 'Place of Residence', there are three radio button options: 'Country, State or Region' (selected), 'Location', and 'Zip/Postal Code'. Below these options is a text input field, a 'Location' dropdown menu, and an 'Add' button.

Only one place of residence filter can be used at a time. If you add a filter criterion while one was already selected, the new filter will replace the one previously selected. It is possible however to combine multiple place of residence filters when using an exact location. For example, you could select the filters United States > California and United States > Nevada.

When using radius filtering, the Miles or Kilometers distance unit is displayed according to the user's preferences (*Path: Resources > My Setup > Preferences > Default Distance Unit*).

### Place of Residence - Country, State or Region

When selecting the Country, State or Region option, the location selector displays reference locations.

When selecting a country and state region, the candidate list will be filtered to only show candidates whose place of residence is set to that specific country and state.

The screenshot shows a form titled "Place of Residence". At the top, there are three radio buttons: "Country, State or Region" (which is selected), "Location", and "Zip/Postal Code". Below the radio buttons is a text input field containing "United States > California". To the right of the text field is a small icon of a document with a plus sign. Further right is a dropdown menu labeled "Location". At the bottom left of the form is an "Add" button.

When selecting a region, the candidate list will be filtered to only show candidates whose place of residence is set to that specific region or within a specific distance of the selected region.

The screenshot shows the same "Place of Residence" form. The "Country, State or Region" radio button is selected. The text input field now contains "United States > California > Anaheim". The dropdown menu to the right is now labeled "Within 10 Miles of Location". The "Add" button is still present at the bottom left.

When selecting a region (with no radius), the candidate list will be filtered to show candidates whose place of residence is set to that precise location or to a location that is lower in the hierarchy of that location (lower level). For example, if the selected location is "United States > California", candidates whose place of residence is set to "United States > California > Anaheim" will also be displayed.

The screenshot shows the "Place of Residence" form with the "Country, State or Region" radio button selected. The text input field contains "United States > California > Anaheim". The dropdown menu to the right is labeled "Location". The "Add" button is at the bottom left.

### Place of Residence - Location

When selecting the Location option, the location selector displays customer's locations.

When selecting a location, the candidate list will be filtered to only show candidates whose place of residence is within a specific distance of the selected location.

### Place of Residence - Zip/Postal Code

The Zip/Postal Code option is used to specify a zip code or postal code as well as the country to which this code belongs to filter the candidate list to only show candidates whose place of residence is within a specific distance of the zip/postal code.

If an invalid zip/postal code is entered or if the system cannot perform a radius filtering for the selected country, an error message will be displayed inviting the user to select a different country or zip/postal code.

**Note:** When a user enters a location and a radius, the location's geo-code (that is, the latitude and longitude) is calculated and the radial distance is used to find the geo-boundary. Once the geo-boundary is calculated, the filtering is done based on whether the candidate's place of residence is within this area, with the help of the geo-code of the candidate's place of residence. If a candidate's place of residence does not have a geo-code (the place of residence is set to a country or state), this candidate will not be displayed.

## Show Filters

The Show information for filter allows Recruiting Center users to filter information displayed in a list using ownership, collaboration or status criteria.

The Show information for filter can appear in the home page, the Requisitions list, Candidates list, Tasks list, Offers list, etc.

The Show filter:

- Can be configured to be displayed everywhere except on the home page.
- Can be configured to be displayed everywhere including the home page.
- Can be hidden.



Values appearing in the Show filter depend on the permissions granted to the user and on the configuration of the application. Available values are the same for all three pages where the Show filter can appear. Possible values are:

- ... I own
- ... I collaborate on
- ... I own or collaborate on
- ... in my coverage area, I own or collaborate on
- All

For example:

- If a user's permissions does not allow the user to see requisitions they don't own, the user will only see the "I own" value.
- If a user's permissions allow the user to see requisitions they don't own but the collaborator feature is not available in the company, the user will not see the following values related to the collaborator feature: "I own or collaborate on", "I collaborate on" and "in my coverage area, I own or collaborate on".
- If a user's permissions allow the user to see requisitions they don't own and the collaborator feature is available in the company, the user will see the following values related to the collaborator feature: "I own or collaborate on", "I collaborate on" and "in my coverage area, I own or collaborate on".

When displaying the Candidates list, a check box called *Include inactive requisitions since* appears just underneath the Show filter. Selecting this check box will add to the Requisitions list the Deleted, Canceled and Filled requisitions.

## Basic Concepts

### Application Time out

A security feature warns users when the application has not been used for more than thirty minutes even if a user is still signed into the application. When the time-out delay is reached, a message notifies users that the time-out delay for the application is imminent.

Two scenarios are possible:

- User takes action: When the application has been idled for thirty minutes, a message notifies the user that the application requires attention. Clicking "Access the application" directs the user to the application. When the user accesses the application, the user can reset the application and a message indicates the remaining time before the session expires.
- User does not take action: If the user does not reset the application within the defined delay, a message is displayed, indicating that the user has been signed out of the application and has to sign in again to use the application.

The time-out delay is set by default to thirty minutes. The reminder displayed before time-out is set by default to ten minutes before time-out.

## Concurrent Management

Concurrent management ensures that only one user can edit a given element at a time.

Concurrent management applies by default to requisitions and requisition templates.

If you try to open a requisition that another user is editing, a message appears indicating that you have read-only access. You cannot edit the requisition until the other user closes it. Same thing with requisition templates. If a user applies a template to a requisition while the template is being edited, the last-saved version of the template in the database will be used.

## Printing

The print functionality allows Recruiting Center users to create a PDF version of a requisition file or candidate file and to print the PDF.

The print function is available in the candidates list and requisitions list as well as within candidate files and requisition files. When using the print function, users can decide to print the content in a list format where information is presented in different columns, or they can choose to print the details of the file where content is presented into sections.

- When users are printing the content in a list format, the content of the file is presented in different columns and the content of each file is displayed in a row. The format of the list (that is, the columns used to display the information) is identical to the requisition or candidate list format used. A maximum of 1000 lines can be printed in the list.
- When users are printing the details of the file, all sections of the file or only specific sections can be printed. For example, a user can choose to print from a candidate file only prescreening and basic profile information. Sections selected by a user when using the print function are saved as defaults for the next print action, but blocks selected within the main submission file section are not. Also, sections available to a user are based on how the file is configured and on user permissions. This means, if a system administrator wanted to allow users to more precisely control what is printed, the administrator can do this by increasing the sections in the file layout. For candidate files, a maximum of 50 files can be printed. For requisition files, a maximum of 15 files can be printed.

When printing candidate files:

- Attachment content is included within the generated PDF, along with the candidate information. When clicking the Print icon, users can select the type of attachments they wish to include in the generated PDF. These attachments are part of the generated PDF, along with the candidate information. Three options are available: Most recent flagged resume, Visible by candidate (Excludes flagged resume), Not visible by candidate (Excludes flagged resume).
- A Table of Contents is available in the generated PDF so that users can easily navigate through the candidate files. Clicking the Bookmarks icon in the PDF will display the Table of Contents.
- Print candidate actions are tracked in the candidate file History tab.

When using the print functionality, only fields containing data are visible in the view/print mode; this means fields with no data will not be rendered when printing. The PDF generated by the print function is identical to the data presented to the user for the selected sections while looking at the information in view mode.

When selecting one or several candidate files in a candidates list or requisition-specific candidate list in order to print them, the Submission file is printed. When selecting one or several candidate general profiles in a search results list or folders list, the General Profile file is printed.

Regarding tracking information in the candidate file History tab, the system displays the 1000 most recent tracking items no matter if printing 1 or 50 candidate files. Therefore, if printing one candidate file, the 1000 most recent tracking items are displayed. If printing five candidate files for example, 200 tracking items are displayed per candidate. For a given candidate, when the maximum is reached, the following message is displayed: "The history contains the {0} most recent items".

**Note:** When printing a candidate file and the Candidate Share mode (Flipbook) is enabled, it is possible to include attachments in the printed document, as long as the user is choosing to print 50 candidates or less. When printing a candidate file and the Candidate Share mode (Flipbook) is not enabled, it is not possible while printing to include the name of candidate facing attached files. Attachments appear in the Attachments tab; they are not part of the candidate file and they are not printed with the file.

## Attachment

Files can be attached to requisitions and candidate files.

The following file formats are supported by the system. System administrators define which formats are available to users.

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

When attaching a file to a requisition, the attachment appears in the requisition file Attachments tab. The attachment can be shared with approvers and users having access to the requisition.

When attaching a file to a candidate file (general profile or job submission), Recruiting Center users can indicate if the attachment will be visible to the candidate. They can also indicate if the attachment is a candidate resume. The Resume column in the Attachments tab allows users to easily view which attachments are resumes. Once a file is tagged as being a resume, users can remove the Resume tag by clicking the Edit button in the Attachments section and selecting No. Files attached through the resume parsing feature are automatically marked as being resumes.

Recruiting Center users can view candidate attachments of type .docx or .odt directly from a browser without having to download and open the file with a native application. In the candidate file Attachments tab, when users click an

attachment of type .docx and .odt files, the attachment is converted into HTML and can be viewed directly from a browser. HTML conversion for these other document types is still supported:

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

## History Event Tracking

The History tab presents useful tracking details on actions performed on different elements.

A History tab is available in candidate files, requisition files, competencies, questions, and disqualification questions. The History tab displays read-only content except for the History tab of the candidate file.

Depending on which part of the application the History tab is displayed, the information provided will vary.

The table presents information available on the History tab of requisitions, competencies, questions, and disqualification questions.

Information	Description
Date	Date when an event occurred.
Type	Event or action performed on an element.
Comments	Comments entered by the user.
By	The "actor" (person or system) who performed the event.

The table presents information available on the History tab of candidate files.

Information	Description
Date	Date when an event occurred.
Events	When a candidate file is modified, either by the candidate or a user, an event to track this action is generated and is displayed.
Language	Language of the candidate file.
Details	Details about the event.
Comments	Comments entered by the user.
By	The "actor" (person or system) who performed the event.

A permission allows Recruiting Center users to view the content of deleted attachments in the History tab. When candidates provide attachments as part of their job application, your organization can remove these attachments. Your organization may decide to not provide access to these deleted attachments which are still visible in the History tab. If you have been granted the permission, you can click the attachment link in the History tab and view the content of deleted attachments. If you do not have the permission, you can see and click the attachment link but the system will display a message indicating that you do not have the permission to view the content of the deleted attachment.

## Rich Text Editor

The Rich Text Editor enables users to edit and format text contained in competency definitions, correspondence, requisitions, requisition templates and review forms (definitions, sections and section items). Text formatted with the editor is presented to users in the TE applications with the specific formatting defined in the editor.

The Rich Text Editor contains standard text processing tools such as:

- cut, copy, and paste functions
- font types and sizes
- bold, italics, and underline
- text and background color
- left, right, and center alignment
- numbered and bulleted lists
- spell checker

### Image or Link Insertion

Image or link insertion may only be available via the enlarged view of the editor, accessible when you first click the Enlarged View icon.

### Spell Checker

The spell checker uses the application language, not the content language. The spell checker is available in several languages.

### Internet Explorer 8

Users on Internet Explorer 8 may experience issues with the toolbar icons operating as expected. Users who experience this issue may either try viewing the page in Compatibility Mode, or use the Rich Text Editor in another browser such as another version of Internet Explorer or Firefox.

### Copying and Pasting Text

When copying content from MS Word and pasting it in the Rich Text Editor tool, some reformatting may be required due to the complexities of mapping MS Word formatting to the Rich Text Editor. Capabilities supported by the Rich Text Editor tool are presented in the following table.

Item	Description
Bold	Full support for the bold style.
Italic	Full support for the italic style.

Item	Description
Underline	Full support for the underline style.
Heading styles and fonts	Heading styles as well as fonts used in heading styles are preserved. Fonts not used in heading styles are treated as a default normal style.
Font name (font face)	Font names (font faces) are generally preserved, even those that are not part of the Rich Text Editor's natively supported fonts (Arial, Comic Sans MS, Courier New, Tahoma, Times New Roman, Verdana).
Font size	The Rich Text Editor supports seven sizes. A "best guess" font size conversion is done by the system. Conversion of font sizes may not be accurate in some unspecified cases (depending on browser, MS Word version, etc.).
Text color	Full support for text color.
Text background color	Full support for text background color.
Hyperlinks	Full support for hyperlinks.
Bulleted and numbered lists	<p>Lists should be created using the bullets, numbering and multilevel list features in MS Word. List types that do not conform to the recommended practice are not supported.</p> <p>The bullet type is preserved (bullet or number), but the symbol (circle, square, etc.) or notation (number, roman numerals, alphabetical) will be replaced by the browser's defaults.</p> <p>Numbering continuation between two distinct numbered lists is not supported.</p> <p>The color of the bullet is not preserved.</p> <p>Spacing around list blocks is browser-specific.</p> <p>Indentation level is preserved if made using the indent buttons. Custom indentations made using the MS Word ruler is not supported.</p>
Line spacing	<p>No line spacing information is preserved. All custom line spacing is converted to a single line. The only exceptions are:</p> <ul style="list-style-type: none"> <li>Headings: the line spacing is browser-specific.</li> <li>Lists: line spacing is browser-specific.</li> </ul>
Images	Images are not supported and will not be included.
Tables	<p>Table row and column dimensions are preserved.</p> <p>The presence or absence of borders is preserved.</p> <p>Colors are not preserved, default is black. Background and border colors are not preserved.</p> <p>Styles are not preserved, default is solid line.</p> <p>Custom widths are not preserved, default is 1px.</p> <p>Custom table and cell widths are converted to their pixel / percent equivalent. This conversion runs differently, based on the browser being used. This may result in discrepancies from the original table. Merged cells are preserved.</p>

**Recommended Practices for Constructing MS Word Documents to Minimize Reformatting Required When Pasting Content Into the Rich Text Editor**

In general, the less complex the MS Word document is, the less reformatting a user will need to do when copying content from MS Word and pasting it in the Rich Text Editor. Below are some recommendations for creating MS Word templates.

Use the more common fonts that come with MS Word, such as:

- Arial
- Times New Roman
- Courier New
- Verdana
- Comic MS Sans

Avoid using images in the MS Word template documents, as they are not supported in the Rich Text Editor.

Avoid using the horizontal ruler to customize indent lines, as this type of formatting is not supported in the Rich Text Editor. Use the standard indent buttons.

Minimize the use of custom line spacing, as this is not supported in the Rich Text Editor.

Avoid using colored bullets in the MS Word template documents, as they are not supported in the Rich Text Editor.

Avoid using custom ruler indentation on bullets, as custom indentation on bullets is not supported in the Rich Text Editor. Use standard indent buttons.

Avoid mixing bullet types in the MS Word template documents, as mixed bullet types are not supported in the Rich Text Editor.

Create lists using the standard bullet types, numbering, multilevel list and indent features available in MS Word.

## System Status

A status indicates the current state of an item in the system. It allows users to create items without making them available right away and to remove an existing item from use without removing it from the database.

Items can have one of the following statuses:

- Draft: A Draft item can be modified. A Draft item cannot be used. It must be Active before it can be used.
- Active: When an item is Active, only the name and description can be modified. It is not possible to update the behavior of the item.
- Inactive: When an item is Inactive, only the status can be modified. The only possibility is to go back to the Active status.

A Draft item can become Active. An Active item can become Inactive. An Inactive item can become Active. However, an Active item cannot "go back" to the Draft status.

## Callout

A callout is a small window or bubble containing information on an element.

Callouts are available throughout the application. To see information contained in a callout, users must place their mouse over the element.

No configuration is required for the callouts. If a user has access to a specific area based on permissions and that area has a callout, the user will be able to see the callout. If there is content that the user cannot see based on the user's permissions and the callout behavior, the field label will be displayed, but the field will be blank. For example, if a user does not have the permission to see the name of internal candidates, the user will still have access to the callout, but the name will show as blank for internal candidates.

The table presents callouts available in the product, fields available in each callout, where the callout is used, and if field security level and availability are taken into consideration.

Callout	Fields in the Callout	Where the Callout is Used	Security Level/Field Availability Impact
Attendee Callout	First Name, Last Name, Home Phone, Cellular Phone, Work Phone, Email.	In the Schedule an Interview tool.	None
CSW Callout	Step Name, Step Information.	In the Change Step and Status screen of the requisition-specific candidate list.	None
Requisition Callout - Small	Requisition Title (with an hyperlink to the file), Requisition ID, Activated Languages, Activated Features (such as ACE Alert, Daily Recruiting Report, Urgent Need, Prevent Posting).	In the Requisitions list and Tasks list (in the Requisition column). For security reasons, the requisition callout on the Tasks list will show the callout. However, there will be no access to the requisition for all tasks that are in the Approve Requisition or Approve Offer status for any users. The user can get access to view a PDF of the requisition from within the Approval screen.	None
Requisition Callout - Large	Requisition Title (with an hyperlink to the requisition file), Requisition ID, Status, Recruiter, Status Details, Hiring Manager, Primary Location, Requisition Type, Hired Candidates, Offers Accepted, Activated Languages, Activated Features (such as ACE Alert, Daily Recruiting Report, Urgent Need, Prevent Posting), Department.	In the Requisition Selector of the Match Candidates to Requisitions feature, the Offers list (in the Requisition column), the Requisition Title on the Candidate Job Submission page, the Requisition Title on the Candidate All tab (when grouped by Requisition).	None
Candidate Callout	Candidate Name (with an hyperlink to the file), Home Phone, Cellular Phone, Work Phone, Email.	In the Tasks list (in the Candidate column), the Offers list (in the Candidate column), the Search Results list, the requisition-specific candidate list, the Candidates list, the candidate submission list.	Field security level permissions and field availability are taken into consideration.



Callout	Fields in the Callout	Where the Callout is Used	Security Level/Field Availability Impact
Candidate Comment Callout	Comment content.	In the candidate file History tab.	None
Requisition Comment Callout	Comment content.	In the requisition file History tab.	None
Task Callout	Task name (with an hyperlink to the file), Task Type, Assignment Date, Owner.	In the Tasks list (in the Task column).	None
Task Comment Callout	Comment content.	In the Tasks list (in the Comment column).	None
Submission Active/Inactive Callout	Requisition Title (with an hyperlink to the file), Step/Status, Comment.	In the candidate card of the candidate file.	The requisition title viewing permission is ignored; only submissions the user can see will be listed.
List Format Callout	List format information.	In the Requisitions list, the Mini Requisition list, the requisition-specific candidate list, the All Candidate by Requisition list, the All Candidates by Folder list, the All Candidates by Offer list, the quick search results list, the advanced search results list, the candidate capture/possible duplicates list of automatically pooled candidates.	None
Message Template Callout	Message title, information, structure.	In the Send Correspondence feature, when selecting a message template.	None
Message Paragraph Callout	Paragraph title, preview of paragraph body (in active language).	In the Send Correspondence feature, when the message template selected contains many paragraphs.	None
Group Callout	User Name, Employee ID, Job Title, Email, Department.	In the Requisitions list, the Candidates list, the Offers list.	None
Create Candidate Callout	For job-specific submission: Selected Language, Selected Requisitions. For general profile: Selected Language, Folder location and name.	In the Create a Candidate feature.	None
Create Candidate Flow Description Callout	Create candidate flow title and description.	In the Create a Candidate feature when selecting a candidate file creation template.	None

Callout	Fields in the Callout	Where the Callout is Used	Security Level/Field Availability Impact
Most Advanced Progression Status Callout	Requisition Title (with an hyperlink to the file if the user has the required permission), Requisition ID, Status, date when moved into that status.	In the Candidates list, in the Most Advanced Progression Status column.	If a user does not have the permission to see the Most Advanced Requisition, the hyperlink to the requisition will not be available.
Disqualification Question Explanation Callout	Disqualification Question Explanation Title, Disqualification Question Explanation Comment.	In the Disqualification Questions library (Detailed mode), the requisition file and the candidate submission.	None
User Information Callout	First Name, Last Name, Title (of user), ID (of user), Email Address, Work Phone Number, Extension, Fax Number.	In the User Selector available in the Share Candidate feature, Request Approval feature and Request Contribution feature.	None
Requisition Template Callout	Requisition Template Title, Job Code, Status, Requisition Type, User Group, Recruiter.	In the Requisition Template Selector when selecting a template for a requisition file.	None
Requisition Template List Callout	Requisition Template Title, Activated Languages.	In the Requisition Templates library.	None
Attachment Callout	Candidate Name, Job Specific Attachments, Other Attachments.	In the Candidates lists.	Users must have the Access Attachments tab permission to see the callout.
Primary Location Callout	Primary Location, Country, State/Province, Region, Address, City, Zip/Postal Code.	In the left pane of requisitions and requisition templates.	None
Screening Description Callout	Screening Description.	In the job submission Screening block.	None

## Autosuggest in Selectors

The autosuggest feature is available for selectors having a large list of values.

When typing letters in a large selector, a drop-down list appears and the system presents values that are relevant with the letters entered and retrieves as many entries as possible.

The lookup trigger begins to work as soon as two characters are entered. A list of matching values beginning with the two characters that were entered is displayed.

For example, if you are looking for Bishop University, if you type "bi" or "un", Bishop University will match. But if you type "shop", Bishop University will not show up.

The list continues to narrow as more characters are entered. The match is made based on a "contains" search to increase likelihood of finding what the user is seeking. A list of ten elements is displayed in the suggested list. When more than ten elements are available, the {more...} option is available. Clicking {more...} opens a selector with pre-filtered data. When the right entry is found, the user simply selects it from the list.

To increase selection speed of relevant values, for Organization, Location and Job Field, the autosuggest works across the entire structure hierarchy using a single autosuggest field. In addition to the autosuggest feature, users at any time can use the Selector icon to the far right of the field to open up a full search browser to find the value they are looking for.

For example, if a user types the letters *ca* to find a primary location, the autosuggest feature might suggest:

- Canada
- Canada > British columbia
- Canada > Nunavut
- Canada > Ontario
- Canada > Ontario > Ottawa
- Canada > Ontario > Toronto

For example, if using a more precise term such as Toronto, the autosuggest feature then might just suggest Canada > Ontario > Toronto.

**Note:** Capitalization and accentuated characters are ignored. For example: é=e, C=c. To find the word École, type École or Ecole. The following special characters are supported: &, - and '. All other special characters are ignored.

For very large lists like employees or organizations containing sometimes more than 100 000 values, there might be a small delay because the filtering applied to the result set is based on user permissions. Newly created elements or changed elements are available within minutes.

The table shows the content appearing in a selector where the autosuggest feature is available.

List	Content
User (Recruiter, Hiring Manager, Collaborator, Recipient, etc.)	First Name and Last name, alphabetically sorted.
User Group	Group description, alphabetically sorted.
Job Role, Position, Department	Code and name, alphabetically sorted.
Requisition Template	Code and title, alphabetically sorted.
Candidate Selection Workflow	Name, alphabetically sorted.
Organization, Location, Job Field	Name, sorted by sequence defined in SmartOrg.
Employer, Institution, Program, Certification	Description, alphabetically sorted.
Message Template	Name, alphabetically sorted.

List	Content
Time Zone	Description, alphabetically sorted.
Requisition	Number and title, alphabetically sorted.
Email	Name, alphabetically sorted.
Large User-Defined Selection	Code and description, alphabetically sorted. The configuration of the code and description display has no impact on the autosuggest feature.

## Item Requiring Attention Icon

The Item Requiring Attention icon appears in Candidates list and Requisitions list to draw users' attention to items that they own and that require viewing.

The Item Requiring Attention is only displayed to the owner of an element. A user who creates a requisition is considered the owner of the requisition. However, when creating a requisition, the user can specify other owners for the requisition by completing the Recruiter, Recruiter Assistant, Hiring Manager and Hiring Manager Assistant fields.

The icon is removed when:

- An item that has the Item Requiring Attention icon is opened.
- The user takes action on an item from the list view (without opening the item).

## Time Zone

Time zones are used throughout the system where a date or time is required.

In the Recruiting Center, dates and time are presented in a manner that takes into account the user's time zone thereby making dates easier to understand and freeing users from the task of converting the dates themselves.

System administrators can set the default time zone for an entire company. Users who are in the same time zone as the company do not need to modify their time zone. However, users who are not located in the same time zone as their company will need to modify their time zone to view information in their own time zone (for interview scheduling, for example). Time zone changes can be done by users via the My Setup feature if they were granted the permission by their system administrator.

**Note:** As a best practice, users should set their time zone under My Setup if they want to have the correct time displayed.

An example where time zone is used is for scheduling interviews with candidates. When scheduling an interview, the time zone of the person scheduling the meeting is used as a reference value. This means that the time of the meeting in the Recruiting Center is displayed according to the time zone selected by the person who scheduled the meeting, but

the time of the meeting in Outlook or Lotus Notes is displayed according to the time zone set in the recipients' Windows settings.

For example, a user living in San Francisco schedules an interview from 2 p.m. to 3 p.m. Pacific Time. For an attendee living in New-York, the time of the meeting in Recruiting is from 2 p.m. to 3 p.m. Pacific Time, but the time of the meeting in Outlook is from 5 p.m. to 6 p.m. Eastern Time.

Another example where time zone is used is for requisition posting. When posting requisitions, the time zone taken into account is the time zone of the user doing the posting (and not where the requisition is posted).

## Daylight Savings Time

The same calculation is used during the daylight savings period across the Recruiting Center.

Daylight savings time is properly calculated for dates handled across the Recruiting Center. Many dates are time zone sensitive and as such are converted.

## Algorithm to Determine a User's Time Zone

To determine a user's time zone, the algorithm is as follows:

- Use the user's preferred time zone (under Recruiting Center > Resources > My Setup > Preferences > Time Zone and also under Configuration > [SmartOrg] Administration > User Accounts > select a user account > General Preferences > Time Zone).
- If the above was not defined, use the user's preferred time zone (Configuration > General Configuration > Settings > Time Zone).
- If the above was not defined (unlikely), use the user's operating system UTC offset.
- If the above was not defined, use the default time zone (Configuration > [Career Section] Settings).

## Time Zones in Oracle Taleo Enterprise Edition

City	Time Zone Name	UTC Offset
Midway Islands, Samoa	Samoa Time	UTC -11:00
Honolulu	Hawaii Time	UTC -10:00
Anchorage	Alaska Time	UTC -9:00
Tijuana	Pacific Mexico Time	UTC -8:00
Vancouver, San Francisco, Los Angeles	Pacific Time	UTC -8:00
Chihuahua, La Paz, Mazatlan	Western Mexico Time	UTC -7:00

City	Time Zone Name	UTC Offset
Edmonton, Denver, Boise, Salt Lake City	Mountain Time	UTC -7:00
Arizona, Hermosillo	Mountain US Time	UTC -7:00
Cancun, Merida	Atlantic Mexico Time	UTC -6:00
Chicago, Winnipeg, Dallas	Central Time	UTC -6:00
San Jose, Managua	Central America Time	UTC -6:00
Regina (Saskatchewan)	Central Canada Time	UTC -6:00
Mexico City	Mexico General Time	UTC -6:00
Bogota, Lima, Quito, Panama City	Pacific South America Time	UTC -5:00
Montreal, New York, Washington D.C.	Eastern Time	UTC -5:00
Kingston, Georgetown	Jamaica Time	UTC -5:00
Caracas	Venezuela Time	UTC -4:30
Asuncion	Paraguay Time	UTC -4:00
Cuiaba	Western Brazil Time	UTC -4:00
La Paz, San Juan	Western South America Time	UTC -4:00
Santiago	Chile Time	UTC -4:00
Halifax	Atlantic Time	UTC -4:00
St-John's (Newfoundland)	Newfoundland Time	UTC -3:30
Buenos Aires, Georgetown	Eastern South America Time	UTC -3:00
Greenland, Saint-Pierre and Miquelon	Greenland Time	UTC -3:00
Brasilia	Eastern Brazil Time	UTC -3:00
Mid Atlantic	Mid-Atlantic Time	UTC -2:00
Azores	Azores Time	UTC -1:00
Cap Verde Islands	Cape Verde Time	UTC -1:00
Dublin, Edinburgh, Lisbon, London	Western European Time	UTC 0:00
Abidjan, Dakar, Reykjavik	Greenwich Mean Time	UTC 0:00
Casablanca	Casablanca Time	UTC 0:00
Abuja, Alger, Kinshasa, Luanda, Niamey, Yaounde	Western Central Africa Time	UTC +1:00
Namibia	South Western Africa Time	UTC +1:00
Brussels, Copenhagen, Madrid, Paris	Central Europe Time	UTC +1:00
Sarajevo, Skopje, Warsaw, Zagreb	Central Europe Time	UTC +1:00
Belgrade, Bratislava, Budapest, Ljubljana, Prague	Central Europe Time	UTC +1:00

City	Time Zone Name	UTC Offset
Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna	Central Europe Time	UTC +1:00
Cairo	Egypt Time	UTC +2:00
Harare, Pretoria	South Africa Time	UTC +2:00
Jordan	Jordan Time	UTC +2:00
Beirut	Lebanon Time	UTC +2:00
Damascus	Syria Time	UTC +2:00
Gaborone, Harare, Lilongwe, Lubumbashi, Lusaka, Maputo	Central Africa Time	UTC +2:00
Athens, Bucharest	Eastern Europe Time	UTC +2:00
Helsinki, Riga, Tallinn, Sofia, Vilnius, Kiev	Baltic States Time	UTC +2:00
Jerusalem	Israel Time	UTC +2:00
Baghdad	Iraq Time	UTC +3:00
Kuwait City, Riyadh	Arabian Peninsula Time	UTC +3:00
Nairobi	Eastern Africa Time	UTC +3:00
Moscow, St. Petersburg, Volgograd	Russia Time	UTC +4:00
Tehran	Iran Time	UTC +3:30
Abu Dhabi, Muscat, Dubai	Persian Gulf Time	UTC +4:00
Baku, Tbilisi, Yerevan	Caucasus Time	UTC +4:00
Kabul	Afghanistan Time	UTC +4:30
Bishkek	Kyrgyzstan Time	UTC +5:00
Dushanbe, Islamabad, Karachi, Toshkent	West Asia Time	UTC +5:00
Calcutta, Chennai, Mumbai, New Delhi	India Time	UTC +5:30
Kathmandu	Nepal Time	UTC +5:45
Almaty, Astana	Kazakhstan Time	UTC +6:00
Dhaka	Central Asia Time	UTC +6:00
Novosibirsk	North Central Asia Time	UTC +6:00
Rangoon	Myanmar Time	UTC +6:30
Krasnoyarsk	North Asia Standard Time	UTC +7:00
Bangkok, Hanoi, Jakarta	South Eastern Asia Time	UTC +7:00
Irkutsk, Ulaan Bataar	North Eastern Asia Time	UTC +8:00
Perth	Western Australia Time	UTC +8:00

City	Time Zone Name	UTC Offset
Beijing, Chongqing, Hong Kong, Urumqi	China Time	UTC +8:00
Singapour	Singapore Time	UTC +8:00
Yakutsk	Yakutsk Time	UTC +9:00
Osaka, Sapporo, Tokyo	Japan Time	UTC +9:00
Seoul	Korea Time	UTC +9:00
Adelaide	South Australia Time	UTC +9:30
Darwin	Australia Northern Territory Time	UTC +9:30
Canberra, Melbourne, Sydney	South Eastern Australia Time	UTC +10:00
Vladivostok	Vladivostok Time	UTC +10:00
Brisbane	Queensland Time	UTC +10:00
Hobart	Tasmania Time	UTC +10:00
Port Moresby	Papua New Guinea Time	UTC +10:00
Lord Howe	Lord Howe Island Time	UTC +10:30
Magadan, Solomon Islands, New Caledonia	Central Pacific Time	UTC +11:00
Anadyr	Chukot Time	UTC +12:00
Auckland, Wellington	New Zealand Time	UTC +12:00
Fiji, Kamchatka, Marshall Islands	Fiji Time	UTC +12:00
Eniwetok, Kwajalein	Date Line Time	UTC +12:00
Chatham Islands	Chatham Islands Time	UTC +12:45
Enderbury	Phoenix Islands Time	UTC +13:00
Nuku'alofa	Tonga Islands Time	UTC +13:00
Kiritimati	Line Islands Time	UTC +14:00

## Time Zone Sensitive Dates in the Recruiting Center

Requisition File - External Description Block - Opening Date	Requisition File - External Description Block - Closing Date
Requisition File - Internal Description Block - Opening Date	Requisition File - Internal Description Block - Closing Date
Requisition File - History Tab - Event Dates	Requisition File - Posting & Sourcing - Corporate Posting Dates
Requisition File - Posting & Sourcing - eQuest Posting Date	Requisition File - Posting & Sourcing - Staffing Agents



Requisition File - Posting & Sourcing - Staffing Agency (Contingent)	Requisition File - Posting & Sourcing - Source - Event List - Start Date (View & Edit)
Requisition File - Posting & Sourcing - Source - Event List - End Date (View & Edit)	Events in the Candidate Source Tracking Block
Requisition List - Status Detail	Requisition List - Contacted Candidates ("From" in the Callout)
Requisition Template File - Effective From (Status)	Requisition Template File - Effective Till (Status)
Requisition Template List - Effective From	Requisition Template List - Effective Till
Prescreening Question File - Creation Date	Prescreening Question File - History - Event Date
Prescreening Competency File - History - Event Date	Prescreening Disqualification Question File - Creation Date
Prescreening Disqualification Question File - History - Event Date	Requisition Action - Share - Date in Printed PDF
Requisition Approval Task & eShare - Date in Requisition Detail PDF (must reflect the file)	
Candidate Action - Schedule an Interview - Meeting Date	Candidate Action - Update an Interview - Meeting Date
Candidate Action - Cancel Interview - Meeting Date	Candidate File - Detail - Creation Date
Candidate File - Basic Profile - Date of Availability	
Candidate File - Attachments Tab - Submission-specific Attachments	Candidate File - Attachments Tab - Other Attachments
Candidate File - Self-Assigned Task List - Creation Date	Candidate File - History Tab - Event Dates
Candidate File - History Tab - Workflow Event Date	Candidate List - Quick Filters - Since (Effect on filtering)
Candidate List - Quick Filters - Last Activity Date (From & To) (Effect on filtering)	Candidate List - Advanced Filters - Fields of Type Date
Candidate List - Standard Fields of Type Date	Candidate Advanced Search - Date Type criteria
Candidate Workflow Assistant - Workflow Event Date	Candidate Workflow Assistant - Self-Assigned Task - Due Date
Candidate Workflow Assistant - (Hire candidate) Start Date (with the setting "Ignore Time Zone for Offer Start Date"=NO)	Candidate Action - Print/Share - Date in Printed PDF
Task List - Due Date - Task List - Task Callout (Assignment Date)	

Offer Grid - Expiration Date	Offer Grid - Created On
Offer Grid - Approved	Offer Grid - Extended
Offer Grid - Start Date (with the setting "Ignore Time Zone for Offer Start Date"=NO)	Offer Action - Update Expiration Date
Offer Action - Update Start Date (with the setting "Ignore Time Zone for Offer Start Date"=NO)	Offer Action - Extend Offer Verbally
Offer Action - Capture Response (Accepted) - Accepted On	Offer Action - Capture Response (Accepted) - Start Date (with the setting "Ignore Time Zone for Offer Start Date"=NO)
Offer Approval Tab - Decision Date & Time	Candidate Selection Workflow - Update Start Date (No RSOffer) (with the setting "Ignore Time Zone for Offer Start Date"=NO)
Offer Approval Task & eShare - Date in Offer detail PDF (must reflect the grid) (with the setting "Ignore Time Zone for Offer Start Date"=NO)	Offer Approval Task & eShare - Date in Candidate Submission detail PDF (must reflect the file)

## Data Structure: Organization, Location, Job Field

The data structure enables each customer to customize Oracle Taleo Enterprise Edition products such that they reflect how the customer does business. Each customer's organization is defined as a combination of three main elements: Organizations, Locations, Job Fields (OLF). OLF is also referred to as contextualization.

Organization describes the hierarchical structure of an organization. Up to 20 organization levels can be created. The system proposes the following organization structure, but other terms may be chosen to better reflect the hierarchical structure of a company:

- Company
- Sector
- Department
- Division

Location represents a geographical area, such as a country or state. Locations are listed in a hierarchical order, from the broadest geographical area (often a country) to increasingly specific areas (work location). Up to 5 location levels can be created. Locations must be associated to network locations used for various purposes, mainly integration with external systems, using a common and standard universal structure. Oracle strongly recommends defining a zip code for the location. A common location structure is:

- Country
- State/Province
- Region
- City
- Work Location

Worker locations can be mapped to the Location structure. The worker location is used as an employee (post-hire) function whereas the location (in OLF) is meant for recruiting purposes. For example, a location could be 100 Main Street and a worker location could be "Sector 44" or "Cubicle A". Worker locations are not created in Configuration. Worker locations are typically imported from an external HRMS system. Once worker locations are imported, worker locations can be mapped to the Location structure via Integration or by the system administrator in Configuration. Any Location element can be given the Worker Location and the Worker Location Address properties. System administrators can then configure worker locations to appear in requisitions, offers, correspondences, requisitions lists, and candidates lists just like any other fields. For details, see Worker Location.

Job Field represents the employment sectors or domains. Up to 4 job field levels can be created. Job fields must also be mapped to the network job fields, again to have a common language with the external world, be for posting or integrations. This mapping also serves to inherit existing classification for competencies. The system proposes the following job field structure, but other terms may be chosen to better reflect the structure of a company:

- Category
- Function
- Specialty

Contextualization, that is the Organization-Location-Job Field structure associated to an element, represents the framework the application uses to organize, classify, link, match or search for information in the application. Although Organization-Location-Job Field structures are configured with the help of an Oracle representative during the implementation phase, modifications to structure elements can be done in maintenance mode at any time. It is possible to customize the system to reflect a company's unique structure and make modifications to Organization-Location-Job field elements in real time so that the data accounts for any changes in the structure.

There are several key elements of the Oracle Taleo Enterprise Edition products that are tied to the Organization-Location-Job field structure such as candidate selection workflows, requisitions and requisition templates, message templates, user management, prescreening, approvals, etc.

The purpose of contextualizing an element is to make the element relevant according to a specific context. Below is an example of contextualization with candidate selection workflows. The CSW1 would not be available to the user for this requisition, because the last level of its Location does not match that of the requisition. The CSW2 could be available to the user for this requisition. The parent element of the lowest level of the requisition for each dimension (Organization, Location or Field) must be the same as the lowest level of the workflow for each dimension.

Example:

Requisition:

- Organization: Urban transportation
- Location: United States/California/Los Angeles
- Job Field: Bus driver

CSW1:

- Organization: Urban transportation
- Location: United States/California/San Jose
- Job Field: Bus driver

CSW2:

- Organization: Urban transportation

- Location: United States
- Job Field: Bus driver

When using contextualization, the system applies the AND operator between Organizations, Locations and Job Fields entities. However, the OR operator is applied between elements of the same entity.

In the following example, a field would be displayed if Canada (or any of its children) AND Architecture were selected.

- Location: Canada
- Job Field: Architecture

In the following example, a field would be displayed if Canada AND Architecture were selected, or if United States AND Architecture were selected.

- Location: Canada
- Location: United States
- Job Field: Architecture

# 3 Requisition Management

## Requisitions List

### Requisitions List

The requisitions list displays requisition information into different columns and provides tools to filter requisitions and to customize the requisitions list.

The requisitions list is organized into three sections:

- The left pane contains the *Show requisitions* filter which allows users to filter requisitions using ownership values. *Quick filters* and *advanced filters* are also provided to filter the requisitions list down to relevant information. The pane can be expanded or collapsed.
- The right pane contains *online help* and *online clips* if these were enabled. The pane can also be expanded or collapsed using the Hide/Show Supporting Tools icon.
- The center pane displays requisitions. The List Format Configuration icon allows users to select the list format they wish to use to display requisitions in the list. Users can also create up to three list formats and select columns to display specific information (if permissions were granted). Several *actions* can be performed directly in the list. A contextual action menu is available by clicking the arrow next to the file title. For information on the tools available in the list, see *List Usage*.

To navigate from one requisition to another within the requisitions list, users can use the navigation icons.

## Requisition File

### Requisition File

A requisition file details the specific requirements for a job position.

A requisition file is organized into three sections:

- The left pane contains the requisition card in the top section and supporting information in the bottom section. The pane can be expanded or collapsed.
- The right pane contains supporting tools such as the *online help*, the *diagnostic tool*, and the *online clips* if these were enabled. The pane can also be expanded or collapsed.
- The center pane displays the requisition form. Information displayed will vary whether the view mode or edit mode is selected.

#### View Mode

When opening a requisition file, users are always in view mode and they can from there choose to go into edit mode. This provides a cleaner layout and eliminates the need to "close" the file (to exit out of it and reactivate other buttons on the screen) if only viewing the file. In view mode, only fields for which data is provided are displayed. If a field is empty, it does not display in view mode.

An action bar is available at the top. Users can click an action or use the More Actions menu which is a dynamic menu of additional actions available during the lifecycle of the requisition.

*Tabs* containing requisition-related information are available. The main content of the requisition file is within the Requisition tab, which includes various sections that can be expanded or collapsed. The other tabs contain peripheral information.

From the Requisition tab, users can click the down arrow next to the word Requisition to access a table of contents that allows quick jumping to different sections and sub-sections of the file.

### Edit Mode

In edit mode, all fields included in the requisition form are displayed. Fields that do not contain data are displayed according to user permissions. Required fields are highlighted with a red asterisk. To view required fields in different stages, users can use the *Show fields* required to menu.

From the Requisition tab, users can click the down arrow next to the word Requisition to access a table of contents that allows quick jumping to different sections and sub-sections of the file.

### Field Labels in Multilingual Requisitions

The field labels in a multilingual requisition will display in the language the user used to sign into the application. The user-entered values will display in the selected requisition locale.

Below are two example to explain the behavior.

Example 1: A requisition is available in English, French and Spanish. The user accesses the application in English and decides to view the Spanish version of the requisition. Each field label and drop-down will be displayed in English but the content of each input field will display the Spanish value.

Example 2: A requisition is available in English, French and Spanish. The user accesses the application in Spanish and decides to view the Spanish version of the requisition. Each field label will displayed in Spanish and the content of each field will display the Spanish value as well.

## Requisition File Tabs

The table shows tabs available in the requisition file.

Requisition File Tab	Description
Requisition	Contains all the details of the job.
Alerts	This is where users can set the <i>ACE candidate alert</i> which will inform them when a candidate meets specific required criteria. Users can also specify to request more information about these candidates.
Attachments	Contains <i>attachments</i> for the requisition.
Approvals	Displayed when an <i>approval request</i> has been generated. The tab appears for all users that can view the requisition. When no approval request has been generated, the Approvals tab is hidden. This tab

Requisition File Tab	Description
	provides an easy means to access and review the most recent approval information for the requisition. Authorized users can also modify or resend approval requests from this page.
Posting and Sourcing	Provides access to posting and sourcing features such as career section posting, job board distribution through eQuest, staffing agents, non-electronic media. Allows users to modify the list of sources associated with the requisition.
Autopooling Criteria	Contains <i>autopooling</i> criteria.
History	Contains a log of all actions performed on the requisition file. See <i>Requisition File History</i> .
Reports	Allows users to define if a <i>daily recruiting report</i> will be sent to individuals regarding the status of the requisition's progress.
Interviews	Allows users to add evaluation questionnaires, view completed questionnaires as well as feedback provided by evaluators.

## Requisition File History Tracking

The History tab in the requisition file contains a log of all actions performed on the requisition.

When a modification is made to the following fields, an event to track this modification is generated and is displayed in the requisition file History tab. The name of the user who performed the action is displayed as well as the date and details of the event.

- Hiring Manager
- Hiring Manager Assistant
- Recruiter
- Recruiter Assistant
- Department
- Job Role
- Requisition Number
- Location
- Other Location
- Job Field
- Organization

## Requisition Statuses

Requisition statuses and status details are listed below. Statuses are in bold.

**Draft**

**Pending** - To Be Approved

**Pending** - Approval Rejected

**Open** - Approved

**Open** - Sourcing - Scheduled

**Open** - Sourcing - Posted

**Open** - Sourcing - Unposted

**Open** - Sourcing - Expired

**On Hold**

**Filled**

**Canceled**

**Deleted**

## Requisition Creation

### Requisition Creation

Recruiting Center users can create requisitions to detail the specific requirements for a job position.

The creation of requisitions is done via the Create Requisition button which is available in the Requisitions channel as well as in the Requisitions page. This button is available to users if they have been granted the appropriate permissions.

The requisition creation process may vary from one company to another. Below is a basic requisition creation process. When creating a requisition, the Create a Requisition assistant is launched. The steps in the assistant varies depending on how they were configured by the system administrator. The following presents a standard flow.

- The first step is to select a *requisition type*. This step is available if more than one requisition type was enabled and if specific permissions were granted to users.
- The second step is to select specific elements such as the position, the department, the hiring manager, the job role, and the requisition template. Depending on the element selected, the system will automatically fill certain fields in the requisition form.
- The third step is to select an *Organization, Location and/or Job Field*.

**Note:** In the Create a Requisition assistant, when you click the Requisition Template Selector icon, the Requisition Template Selector provides a Requisition Title field to search for requisition templates. When you enter a value in the Requisition Title field, the search engine will retrieve requisition templates whose requisition title starts with the exact same value that you entered. For example, if you enter “Manag” in the Requisition Title field, the search engine will retrieve requisition templates with titles such as “Management Director”, “Production Manager”, or “Product Manager”. However, if you enter “duct”, the search engine will retrieve requisition templates with titles starting with “duct” (requisition templates with the title “Product Manager” will not be retrieved).

When all of the above information has been provided, users complete any required fields (marked with a red asterisk) and other fields in the requisition form. Depending on the company's policies, the template may be very detailed or may include only basic information.



When saving the requisition, a message appears if information is missing in certain fields. Users can also use the *diagnostic tool* located on the right panel to know which fields must be filled to be able to save the requisition.

Once the requisition is completed, the requisition goes through an approval process before being posted on internal or external career sections or job boards.

**Note:** A best practice when creating a requisition is to select a *requisition template*; this will auto-populate many of the requisition fields based on the selected template. Users can select from all requisition templates available which align to their user group context or have no user group defined.

## Creating a Requisition

A user type permission grants users access to this feature.

1. Click Create Requisition.
2. Follow on-screen instructions. The information you will need to provide depends on the flow and options configured by your system administrator.
3. Click Save.

The requisition appears in the Requisition list and the status is Draft.

## Creating a Multilingual Requisition

The user's preferred languages are activated by default (the languages are displayed in the Activated Languages drop-down list).

Users are not forced to translate non-mandatory fields (a non-mandatory field completed in the base language can be left blank in other languages).

Users can change the value selected for a field (they are not limited to the value selected for the base language).

A user type permission grants users access to this feature.

1. Click Create Requisition.
2. Follow on-screen instructions. The information you will need to provide depends on the flow and options configured by your system administrator.
3. Complete the fields.
4. Click Save.
5. In the Activated Languages drop-down list, select the language in which you want to translate the requisition.
6. Complete the fields.
7. Click Save.

The requisition appears in the Requisition list and the status is Draft.

## Requisition Description

The requisition description provides information about the job as well as the qualifications required. The description is displayed to candidates when they apply for a job.

A requisition can have two descriptions: an internal description for current employees, and an external description for external candidates.

An effective job description must be compelling, intelligent and honest. It must attract, intrigue and persuade top talents. It should include specific information and be focused on the talent.

When writing the description of a requisition, consider the tips presented in the table:

Tip	Description
<b>Clear and meaningful job title</b>	Make sure candidates outside the organization will know what it means.
<b>Headline</b>	Start with a brief marketing statement, "grabber".
<b>Structure</b>	Explain where and how the position fits into the organization.
<b>Type of Environment</b>	Explain what it is like to work for the organization (fast-paced, small/large team, multiple projects, etc.).
<b>Description of the Role</b>	Concentrate on important, positive aspects of the position.
<b>Description of the Person Required</b>	List qualifications, important competencies, relevant experience, personal qualities. Be specific and keep it short.
<b>Salary/Benefits/Training/Opportunities</b>	Highlight key benefits offered by the organization.

To improve the formatting of your job description, it is recommended to:

- Copy and paste your text to any simple text editor such as Windows Notepad.
- Copy your text from the text editor and paste it into the requisition Description field.
- Format your text using the Rich Text Editor provided in the Description field.

## Diagnostic Tool and Show Required Fields

The Diagnostic Tool and Show Required Fields features allow Recruiting Center users to know which requisition fields must be completed for certain actions to take place.

The "Show fields required to" feature available in the requisition file, in edit mode, allows users to know which fields must be filled for certain actions to take place, that is, saving, posting and approval request. For example, when selecting the Save action, an asterisk would appear beside the fields that must be completed in order to perform the save action.

The diagnostic tool available in the requisition file right panel, in view and edit modes allows users to see all the fields that are missing information and to jump quickly to those fields to enter the missing information.

## Information on Specific Requisition Fields

Important information regarding specific requisition fields is provided in the table.

Field	Description
Budget	Supports currency symbols, commas, and decimals.
Bonus	Supports commas and decimals.
Salary	Supports commas and decimals.
Opening Date and Closing Date	The requisition Opening Date and Closing Date defined in the External Description section of the requisition form are used as the default dates when posting requisitions to staffing agents and agencies (instead of using the career section Start date and End Date). If these dates are not defined in the requisition, the dates defined by the system administrator will be used instead. The system administrator defines these dates in the Career Section properties, under the Posting section.

## Requisition Approval

### Methods to Request the Approval of Requisitions

When requesting the approval of requisitions, two options are presented to Recruiting Center users.

#### Option 1: Approving requisitions yourself

Users with the appropriate permission can approve requisitions themselves by selecting the **Save as Open** action in the More Actions list. See [Approving Your Own Requisition](#).

#### Option 2: Requesting someone to approve requisitions

Users with the appropriate permission can route requisitions for approval by selecting the **Request Approval** action in the More Actions list. This option is used when at least one person must approve a requisition before it can be posted. See [Requesting Someone to Approve a Requisition](#).

When users are requesting the approval of a requisition, they must choose from a list the people who will be required to do the approval. The list of approvers can be configured or not by the system administrator depending on the type of approval chosen by the organization.

- If the standard approval process is used, users will select approvers from a list containing all of the active users of the database. Users will also be able to create a list of *frequent approvers* in the My Setup feature.
- If Dynamic Approval Routing process is used, the list of approvers will be pre-populated upon selecting the Request Approval action. The list of approvers to be generated is configured by the system administrator within the Dynamic Approval Routing feature. These approvers are displayed based on the configured rules and conditions.

Selected approvers will approve requisitions using one of these methods:

- If the approvers are Recruiting Center users, they will receive an *Approve Requisition* task in the Tasks channel and Tasks list.
- If the approvers are not Recruiting Center users, they will receive an eShare message via email.
- If the approvers are both Recruiting Center users and eShare users, they will receive an Approve Requisition task in the Tasks channel and Tasks list as well as a message via email.

When conducting the approval from either the Tasks list or from eShare, approvers will receive a PDF print version of the requisition file to review (rather than the actual file being visible in the system). Also, approval files are generated according to the user's permissions to view fields having specific security levels.

The approval path can be carried out in two ways:

- **Sequential:** When the first approver receives an approval request, the approver approves the requisition. Once approved, the approval request goes to the next approver, and so on. The requisition does not move forward until each approver in the sequence has approved in order. If one person in the sequence rejects the requisition, then the approval process ends.
- **Parallel:** Multiple approvers receive an approval request and they can all approve the requisition at the same time. Approvers can approve the requisition without having to wait for the others.

If the standard approval process is used within an organization, the system administrator must activate settings to enable sequential or parallel approval. If the Dynamic Approval Routing is used within an organization, approval will be sequential unless there are more than one approver for the same role, then approval will be parallel.

## Self Approving a Requisition

A user type permission grants users access to this feature.

The Save As Open action is available only if the requisition has the Draft status.

A requisition can be approved only if mandatory fields have been filled, unless the system has been configured to accept partially filled requisitions.

1. Open the requisition file.
2. Select Save As Open... in the More Actions list.
3. Enter comments.
4. Click Done.

An event is added to the requisition History tab with the comment entered and the name of the user who performed the action. The status of the requisition is changed to Open/Approved.

A To be Completed task is generated for the requisition if the requisition does not have the completion level Ready For Sourcing. The To be Completed task is assigned to the recruiter assistants if any. Otherwise, it is assigned to the recruiter.

A Ready for Sourcing task is generated for the requisition if the requisition has the completion level Ready For Sourcing. The Ready for Sourcing task is assigned to the recruiter assistants if any. Otherwise, it is assigned to the recruiter.

## Requesting the Approval of a Requisition

A user type permission grants users access to this feature.

The approver must be in the same group as the requisition.

1. Open the requisition file.
2. Select Request Approval... in the More Actions list.
3. Select the approvers. Use Quick Filters to filter the list down to relevant information.
4. Define the sequence of approval by assigning a sequence number using the drop-down list under the Order column.  
When the first approver receives an approval request, the approver approves the requisition. Once approved, the approval request goes to the next approver, and so on.
5. In the After Approval section, select a user to whom you will assign the next task.
6. Enter comments.
7. Complete other necessary fields.

Important information regarding the field “Add the approvers to the list of my frequent collaborators”. This functionality will only add these users as frequent collaborators under My Setup > Preferences. It will not add these users as collaborators on the requisition currently open. Users will need to log out and log back in to see the change applied to their list of frequent collaborators under My Setup > Preferences.

8. Click Done.

The system assigns the requisition to the first approver in the sequence.

- If the approver is a Recruiting user, an Approve Requisition task is assigned to the user. The user can select the following actions: Approve, Reject, Pass, Pending.
- If the approver is not a Recruiting user, the approver receives an eShare approval message. The user can select the following actions: Approve, Refuse to Approve.

## Methods to Approve Requisitions

Approvers can approve requisitions via different tools.

### Using the Tasks Channel

If the approver is a Recruiting Center user, the approver will receive an Approve Requisition task in the Tasks channel. See [Approving a Requisition via the Tasks Channel](#).

### Using eShare

If the approver is not a Recruiting Center user, the approver will receive an eShare message via email.

### Using the Tasks Channel and/or eShare

If the approver is both a Recruiting Center user and an eShare user, the approver will receive an Approve Requisition task in the Tasks channel as well as a message via email.

When conducting the approval from either the Tasks list or from eShare, approvers will receive a PDF print version of the requisition file to review (rather than the actual file being visible in the system). Also, approval files are generated according to the user's permissions to view fields having specific security levels.

## Approving a Requisition on Behalf of Another Approver

From time to time, it may be necessary to approve a requisition on behalf of another approver. This is done by using the action called Amend Approval Path. Users with the appropriate permissions can update an approval decision manually on behalf of one of the approvers. See *Approving a Requisition on Behalf of Another Approver*.

## Approving a Requisition

A user type permission grants users access to this feature

The approver must be in the same group as the requisition.

1. In the Tasks channel, click Approve Requisition.
2. In the Tasks list, click Approve Requisition next to the desired requisition.
3. In the Decide on Approval window, select Approve.
4. Enter comments if mandatory.
5. Click Done.

## Amending a Requisition Approval Path

A user type permission grants users access to this feature.

The requisition status must be Pending - To be Approved.

1. Open a requisition file.
2. Select Amend Approval Path in the More Actions list.
3. Select a decision for an approver.
4. Optional: You can change the order of the approvers.
5. Enter comments.
6. Complete other necessary fields.
7. Click Done.

The system assigns the requisition to the first approver in the sequence.

- If the approver is a Recruiting Center user, an Approve Requisition task is assigned to the user.
- If the approver is an eShare user, the approver receives an eShare approver message.

## Requisition Approval Path Amendment

From time to time, it may be necessary to change the approvers that were originally selected for a requisition. This is done by using the action called Amend Approval Path.

The Amend Approval Path action allows users to modify an existing requisition approval path. Users, if they have the permissions, can add or remove approvers, reorder them, and even decide for them.

The Amend Approval Path action is available in the More Actions menu only if:

- the requisition status is set to "Pending - To be Approved";

- the user was granted the proper permissions.

### Adding Approvers

It is possible to add approvers to an existing approval path. When clicking the Add Approvers button located at the bottom of the Amend Approval window, a window appears and users can filter and select one or many approvers. The newly added approvers appear at the top section of the window with the other approvers. When approvers are added to the approval path, the event "Approval Request Amended: Approvers Added" is added to the requisition's History tab.

### Removing Approvers

It is possible to remove approvers from an existing approval path. When clicking the Remove icon next to the approver's name, the approver is removed from the approval path. When approvers are removed from the approval path, the event "Approval Request Amended: Approvers Removed" is added to the requisition's History tab.

Specific rules apply when removing approvers:

- Users can remove approvers from an approval path only if the approvers have not yet received the Approve Requisition task.
- Users can remove approvers from an approval path they created only if they have the permission "Remove approver, change decision of approver, or change approved requisition recipient when amending an approval path created by these users."
- Users can remove approvers from an approval path created by another user only if they have the permission "Remove approver, change decision of approver, or change approved requisition recipient when amending an approval path created by another user."

### Reordering Approvers

It is possible to reorder approvers in an existing approval path. When approvers are reordered in the approval path, the event "Approval Request Amended: Approvers Reordered" is added to the requisition's History tab.

Specific rules apply when reordering approvers:

- A user can change the order of the approvers only if the approvers have not yet received the Approve Requisition task.
- A user can change the order of the approvers only if the approvers have not yet rendered their decision.

### Deciding for Approvers

It is possible to take an approval decision for an approver. When all the approvers have rendered their decision, an event is added for each decision in the requisition's History tab.

Specific rules apply when deciding for approvers:

- Users can decide for an approver only if the approver has not yet rendered a decision.
- Users can decide for an approver even if the approver has already received the Approve Requisition task.
- Users can decide for an approver in an approval path they created only if they have the permission "Remove approver, change decision of approver, or change approved requisition recipient when amending an approval path created by this user."
- Users can decide for an approver in an approval path created by another user only if they have the permission "Remove approver, change decision of approver, or change approved requisition recipient when amending an approval path created by another user."

- Users can set the decision to Pass for an approver only if they have the permission "Choose to pass when this user decides on behalf of another approver". Two exceptions: a) Except if the approval path has been created by the user and the option "But not when amending an approval path created by the user" was selected for that permission. b) Except if the approval path has been created by another user and the option "But not when amending an approval path created by another user" was selected for that permission.
- Users cannot set the decision to Pass for the last approver if all other approvers have also set their decision to Pass.
- When a decision has been taken for an approver, the decision is displayed in the requisition's Approvals tab: {Current User} on behalf of {Approver Name}.

### Assigning the Task After the Approval

It is possible to change the person who will perform the next task once the approval has been rendered. This is done using the selector next to the Assign the next task to field.

**Amend Approval**

**Message Details**

From  
Team Support

Date  
Sep 7, 2011, 2:35:37 PM

Comments:  
test

For Requisition  
Analyst (CAN0002029)

**After Approval**

\* Assign the next task to

Support, Team

### Adding Approvers to the List of Collaborators

When the option "Add the approvers to the list of collaborators defined for this requisition" is selected, the selected approvers will be automatically added to the requisition's collaborators list. This option is visible if:

- the Collaborators list has been enabled for the requisition;
- the user adding the approvers is the owner of the requisition (Recruiter, Recruiter Assistant, Hiring Manager, Hiring Manager Assistant). If the user is not the owner of the requisition, he must have the permission "Reassign requisitions to owners and collaborators if the user is not an owner".

When the option "Add the approvers to the list of my frequent collaborators" is selected, the selected approvers will automatically be added to the user's frequent collaborators list (available under My Setup > Preferences). It will not add



the approvers in the collaborator's list of the requisition. This option is visible only if the Collaborators list has been enabled for the requisition.

## Requisition Approval Request Reminder

Recruiting Center users can send a requisition approval request reminder.

Users with the appropriate permissions can click the Send Reminder button on the Approvals tab within the requisition file when an active approval is pending. This action will resend the approval request email to the approvers who it is the turn to render their decisions. If the approver is an eShare user, the eShare hyperlink will be present in the email.

## Resending a Requisition Approval Request

A user type permission grants users access to this feature.

1. In a requisition file, click the Approvals tab.
2. Click Send Reminder.
3. Enter comments.
4. Click Done.

## eShare Approval Acknowledgment

eShare users can receive a confirmation of their requisition approvals.

This feature is automatically available on all eShare approvals. When users respond to an eShare approval request, there is a check box to trigger the receiving of an approval acknowledgment. If users choose to receive the acknowledgment, upon completing their decision on the request, the users will receive an email message confirming their action.

Three system message templates have been created for this purpose. There is a standard message available and if desired, system administrators can modify the text of the message sent. The acknowledgment sent will depend on the decision of the approver:

- Requisition Approved Acknowledgment
- Requisition Rejected Acknowledgment
- Requisition Passed Acknowledgment

Approvals decided via the Tasks channel do not have an acknowledgment option; users can view their completed tasks in the Tasks channel by clearing the *Hide completed tasks* option.

## Approver

An approver is a Recruiting Center user who will approve requisitions and/or offers.

A list of approvers can be defined by the system administrator at the department level. A list of personal default approvers, called frequent approvers, can also be defined by the Recruiting Center user in the My Setup feature. When

a requisition and/or offer is ready to be approved (by selecting the Request Approval action), the approval path is selected by default as follows:

- If frequent approvers were defined under My Setup, these approvers will be automatically selected.
- If frequent approvers were not defined under My Setup, the approvers set at the department level by the system administrator will be selected automatically.

When a user selects approvers, the selector only displays users who can be potential approvers. It is possible that no approvers are displayed if none of them are allowed to do the approval. An approver must be an active user and have the user type permission to approve requisitions and/or offers.

## Creating a List of Frequent Approvers

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

1. In the auxiliary navigation bar, click Resources, then My Setup.
2. In the Frequent Approvers tab, click Add...
3. Select one or several approvers.
4. Click Done.

The approvers appear in the Approvers list. These approvers will be automatically selected when requesting the approval of a requisition and/or offer overwriting the default approvers set by the system administrator.

## Modifying the List of Frequent Approvers

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

1. In the auxiliary navigation bar, click Resources, then My Setup.
2. In the Frequent Approvers tab, click Modify...
3. Select one or several approvers.
4. Click Select.
5. Click Done.

The approvers appear in the Approvers list. These approvers will be automatically selected when requesting the approval of a requisition or offer overwriting the default approvers set by the system administrator. The system cannot modify the approver list a user has set under My Setup.

## Adding an Approver to the Frequent Approvers List

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

1. In the auxiliary navigation bar, click Resources, then My Setup.
2. In the Frequent Approvers tab, click Add...

3. Select one or several approvers.
4. Click Done.

The approvers appear in the Approvers list. These approvers will be automatically selected when requesting the approval of a requisition and/or offer. The system cannot modify the approver list a user has set under My Setup.

## Removing an Approver from the Frequent Approvers List

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

1. In the auxiliary navigation bar, click Resources, then My Setup.
2. In the Frequent Approvers tab, click Modify...
3. Hover your mouse on the name of an approver.
4. Click on the Remove icon.
5. Click Done.

The approver no longer appears in the Approvers list under My Setup.

## Requisition Search

### Requisition Quick Search

The requisition search allows Recruiting Center users to quickly find specific requisitions.

The requisition search tool is available at the top right hand corner of the Recruiting Center pages. It is available to users if it has been configured in the user's configuration profile and if the user type permission has been granted.



When performing a requisition search, users enter the title, the number, or a keyword to find the desired requisition. A wild card search may also be used. The search engine only returns results appropriate to the user's permissions and group association.

When performing a requisition search using a keyword, the search engine looks through this content of the requisition file:

- Requisition number
- Requisition title
- Requisition title by manager
- Requisition internal description
- Requisition external description

- Job board summary description
- Internal qualifications
- External qualifications
- Abstract
- Additional information
- Department
- Position
- Requisition UDF
- Offer UDF
- Department UDF
- Requisition Primary Location
- Requisition standard fields (Hire Type, State, Job Schedule, Job Level, Job Shift, Job Type, Study Level, Will Travel, Employee Status)

When performing a requisition search using a keyword, stop words are indexed. Stop words are small words not included in the index and excluded from a search because they are not considered to be significant. For example, words such as "no, not, the, one, and, or" and all single letters are stop words. Stop words are considered by the system when placed within quotation marks or parenthesis.

For example, when users are searching for "The GAP" placed within quotation marks or parenthesis, the system will consider the stop word "the". When users are searching for The GAP without quotation marks nor parenthesis, the system will ignore the stop word in the query.

For the requisition search, the system automatically applies the boolean operator AND. The AND, OR, and NOT operators can be entered manually.

The search is not case sensitive.

For performance and management reasons, a maximum of 300 matching files are displayed.

## Performing a Requisition Quick Search

A user type permission grants users access to this feature.

1. In the Search tool, select Requisitions.
2. Enter data in the field.
3. Click the Search button.

Requisitions that meet the search criteria are displayed in the search results list.

# Requisition Actions

## Duplicating Requisitions

Recruiting Center users can duplicate requisitions to create requisitions similar to an existing one.

A requisition can be duplicated using the Duplicate Requisition icon available in the requisition form. This icon is available to users if they have been granted the proper user type permission. Any requisition can be duplicated regardless of its status.

When duplicating a requisition, all of the information is duplicated except the Alerts tab information (which defaults to your organization's ACE settings) and except the fields presented in the following table.

Requisition File Section	Field Not Duplicated
Logistics - Identification	Requisition Number
Logistics - Identification	Justification
Logistics - Profile - In Contingent Requisition	Target Start Date
Logistics - Profile - In Contingent Requisition	Target End Date
Logistics - Profile - In Contingent Requisition	Start Time
Logistics - Profile - In Contingent Requisition	End Time
Logistics - Abstract	Abstract
Description (External) - General	Opening Date
Description (External) - General	Closing Date
Description (External) - General	Contact Name
Description (External) - General	Contact Email
Description (Internal) - General	Opening Date
Description (Internal) - General	Closing Date
Description (Internal) - General	Contact Name
Description (Internal) - General	Contact Email

**Note:** When a requisition is duplicated, it will carry over the list of approvers from the original requisition as the starting point for approvers on the requisition. If in fact the requisition is never routed for approval but is saved as open, these approvers will remain on the Approvals tab with no dates associated with conducting an approval. Users should understand that if an approver appears on a page with no date next to their name, they never approved the requisition. This scenario illustrates how this might come to occur.

## Duplicating a Requisition

A user type permission grants users access to this feature.

1. Open a requisition.
2. Click the Duplicate Requisition icon.
3. Modify the information as necessary.

Some fields will not be duplicated. For details, see *Fields that are not duplicated*.

4. Click Save.

The requisition appears in the Requisitions list and the status is Draft.

## Requisition Editing

Recruiting Center users can edit requisitions to modify the content of fields in the requisition form.

Users can modify requisitions via the Edit button which is available in the requisition form. This button is available to users if they have been granted the proper user type permission. Users who can edit requisitions can also enter comments on requisitions they are allowed to edit.

The edition of fields contained in a requisition is controlled by the security level set for each field. However, fields appearing in these sections are not editable once a requisition is posted

- Profile (such as Employee Status, Job Type, Schedule, Job Level, Shift)
- Organization-Location-Job Field
- Prescreening (Questions or skills cannot be added, but they can be removed.)
- Candidate Selection Workflow
- Budget (such as Relocation Costs)
- Compensation (such as Currency, Pay Basis, Commission, Vacation)
- Other (such as Citizenship Status, Overtime Status)
- Additional Information
- Contact Name, Opening Date, and Closing Date in the Description section

## Editing Requisition Fields

Settings allow the activation of this feature.

A user type permission grants users access to this feature.

1. Open a requisition.
2. Click Edit.
3. Make changes to the editable fields.
4. Click Save and Close.

## Reopening Requisitions

The Reopen Requisition action allows Recruiting Center users to reopen a requisition previously filled or canceled, with the option to cancel the current hiring or to add new openings.

The Reopen Requisition action provides two options:

- Add Openings: Users can enter a specific number of additional openings or select Unlimited to have an unlimited number of openings.
- Cancel the Hiring of Candidates: This option will be displayed only if there is at least one hired candidate for the requisition.

## Reopening a Filled Requisition and Adding Openings

The requisition status must be Filled.

A setting activates this feature.

A user type permission grants users access to this feature.

1. Open a requisition file.
2. Select Reopen Requisition in the More Actions list.
3. In the Reopen Requisition window, click the radio button next to Add Openings and then indicate a specific number of openings or click the radio button next to Unlimited.
4. Enter comments.
5. Click Done.

The system displays a window in which you indicate whether you want to post the requisition immediately or at a later time. If you click Yes, a new series of steps is displayed that enable you to post the reopened requisition. A candidate who was hired prior to reopening of the requisition remains on the requisition and retains the Hired step and status. The requisition that was filled is reopened and new openings are added while retaining candidates hired to fill the original opening.

## Reopening a Requisition that Was Cancelled not Filled

The requisition status must be Cancelled.

This action does not apply to requisitions that were only draft then cancelled.

A setting activates this feature.

A user type permission grants users access to this feature.

1. Open a requisition file.
2. Select Reopen Requisition in the More Actions list.
3. Indicate a specific number of job openings or indicate Unlimited.
4. Enter comments.
5. Click Done.

The requisition that was cancelled without being filled is reopened. The system displays a window in which you indicate whether you want to post the requisition immediately or at a later time. If you click Yes, a new series of steps is displayed that enable you to post the reopened requisition.

## Reopening a Filled Requisition and Cancelling the Hiring

The requisition status must be Filled.

This option will be displayed only if there is at least one hired candidate for the requisition.

A setting activates this feature.

A user type permission grants users access to this feature.

1. Open a requisition file.
2. Select Reopen Requisition in the More Actions list.
3. Click the radio button next to Cancel the hiring of the candidates.
4. Enter comments.
5. The system displays a reminder that you have to revert the hired candidate's step and status using the Revert action. Click Yes.

Clicking No is not a best practice: if you forget to change the candidate's step and status later, the reopened requisition will contain a candidate whose step and status is Hired.

6. The system displays the candidate list corresponding to the requisition.
7. Click the check box next to the candidate's name and click Revert... in the More Actions list.
8. Enter comments.
9. Click Done.

The filled requisition is reopened and the candidates who had been hired on the requisition are cancelled. If you click the Requisitions tab, the requisition now has Open status in the Requisitions window. If you click the corresponding number in the Candidates column, the candidate who was originally hired is still displayed in the requisition's Candidates list but the person has the step and status prior to reaching the Hired step.

## Saving a Requisition as a Template

1. Open a requisition file.
2. Click the Save Requisition as Template icon.

The requisition is now a requisition template. It is available in the Libraries menu, under Templates.



## Putting a Requisition on Hold

The Put on Hold action is available when the requisition has one of the following statuses: Sourcing - Unposted, Sourcing - Expired, Draft, Approved, Rejected, To be Approved.

The offers under the Offers tab must NOT have the status Accepted with Final Start Date, Accepted with Tentative Start Date, Negotiating, or Extended (waiting for candidate response).

A user type permission grants users access to this feature.

1. Open a requisition file.
2. In the More Actions list, click Put on Hold...
3. Enter comments.
4. Click Done.

Activities related to the requisition are restricted or postponed. The status of the requisition is changed to On Hold.

## Reactivating an On Hold Requisition

The requisition status must be On Hold.

A user type permission grants users access to this feature.

1. Open a requisition file.
2. In the More Actions list, select Reactivate...
3. Enter comments.
4. Click Done.

Once the requisition is reactivated, its status will be reverted to the one before the requisition was put on hold. If the setting Restart Approval Process After "On Hold" Step was used, the status of the requisition will change as follows:

- If the setting is set to Yes, the status of the requisition will become Draft when reactivating an on hold requisition.
- If the setting is set to No, the status of the requisition will be reverted to the status before the requisition was put on hold.

## Filling a Requisition

A user type permission grants users access to this feature.

The Fill action is available when the requisition has the following statuses: Open - Approved, Open - Posted, Open - Expired, Open - Unposted, Open - Scheduled.

1. Open a requisition.
2. In the More Actions list, select Fill...
3. Enter comments.
4. Click Done.

When a requisition is filled, the step of the remaining candidates changes to Rejected and the requisition no longer appears in the requisition list.

## Requesting a Contribution

A user type permission grants users access to this feature.

1. Open a requisition file.
2. In the More Actions list, click Request Contribution....
3. Select a contributor.
4. Complete desired fields.
5. Click Done.

The selected colleague will receive an e-mail requesting to contribute to the task.

## Returning my Contribution

A contribution must have been requested.

User must have completed the contribution.

1. Open a requisition file.
2. In the More Actions list, select Return my contribution.
3. Select the contribution.
4. Enter comments.
5. Click Done.

The originator of the request is notified that the user returned a contribution (the created task is flagged).

If the requisition status is not sourcing, not rejected, not in a closing state, then:

- If the requisition status is Draft, a "To be completed" task is created for the requisition.
- If the requisition status is Approved and complete for sourcing, a "Ready for sourcing" task is created for the requisition.
- If the requisition status is Approved and not complete for sourcing, a "To be completed" task is created for the requisition.

The task is assigned to the originator of the contribution request and flagged (AIF) in the Tasks list.

## Adding a Comment in a Requisition File

A user type permission grants users access to this feature.

1. Open a requisition file.
2. Click the Add Comments icon.
3. Enter a comment.
4. Click Done.

The comment is displayed in the requisition file History tab. The comment cannot be modified once entered.

## Adding an Attachment to a Requisition File

The file will be scanned for viruses. If a virus is detected, the file is not attached. The system displays file information or suggests attaching a different file.

1. Open a requisition file.
2. Under the Attachments tab, click Browse to select a file.
3. Click Add.

The attachment appears in the Attachments tab. The file is attached to the requisition file and can be shared with approvers and users having access to the requisition.

## Removing an Attachment from a Requisition File

1. Open a requisition file.
2. Click the Attachments tab.
3. Move the mouse over the name of an attachment.
4. Click Delete.
5. Confirm your deletion.

## Viewing Attachments in a Requisition File

1. Open a requisition file.
2. Click the Attachments tab.
3. Click the name of an attachment.

## Printing a Requisition

A maximum of 15 requisition files can be printed at a time.

1. Open a requisition file.
2. Click the Print icon.
3. Indicate if you want to have a page break after each section.
4. Select the sections you want to print and their order.
5. Click Print (PDF).
6. Click in the page displaying the PDF.
7. In the Windows File menu, select Print.

## Cancelling a Requisition

A user type permission grants users access to this feature.

The Cancel Requisition action is available when the requisition has one of the following statuses: Approved, Scheduled, Posted, Unposted, Expired, Draft.

The Cancel Requisition action is not available when at least one candidate has been hired for the requisition or an offer was extended.

1. Open a requisition file.
2. In the More Actions list, click Cancel Requisition...
3. Enter comments.
4. Click Done.

An event is added to the requisition History tab with the comment entered and the name of the user who performed the action. The status of the requisition is now Cancel. The requisition is automatically unposted from the corporate posting, the agency posting, and from job boards.

If you cancelled the requisition by mistake, reopen the requisition via the More Actions list.

## Deleting a Requisition

The requisition status must be Draft.

A user type permission grants users access to this feature.

1. Open a requisition file.
2. In the More Actions list, click Delete...
3. Enter comments.
4. Click Done.

The requisition status is changed to Deleted. The Delete Requisition action is deleting all the tasks and current activities related to the requisition. This is only a soft deletion, not a hard deletion in the database.

## Using the Requisition Automatic Filling Option

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

1. In the auxiliary navigation bar, click Resources, then My Setup.
2. In the Preferences tab, click Edit.
3. Select the option I want to use the automatic filling option of the requisition file.
4. Click Save.

When a user will create a requisition, certain fields will be automatically filled.

## Preview of Candidates Matching a Requisition

Recruiting Center users can select a requisition and preview candidates who would be a fit for the requisition based on certain matching criteria and filters.

When a requisition has been posted to a career section, users can view a list of candidates whose profiles match default matching criteria and filters. This is done using the Preview Matching Candidates button available in the requisition Posting and Sourcing tab.

For the Preview Matching Candidates button to appear in a requisition file, the country specified in the requisition must correspond to the country specified by the system administrator. For example, if a user posts a requisition for a job available in the United States, the Preview Matching Candidates button will be displayed if the system administrator selected United States among the countries for which users can view matching candidates. This feature is useful if a company may not feel comfortable in showing to users a list of matching candidates for job posted in some countries because of regulation reasons (EEO regulations for example).

Default matching criteria are set by the system administrator. However, these default criteria can be modified by Recruiting Center users using the Modify Matching Criteria icon to find more relevant candidates for a particular requisition. Default matching filters are also set by the system administrator. These default filters can also be modified by users.

Once the user has found the right candidates, an email is sent to these candidates to invite them to apply for the job.

## Matching Criteria

Matching criteria are:

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

Matching criteria (except for competencies and questions) can be set as Required or Desired:

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

Competencies and questions criteria are considered as wildcards. If these criteria are not set to Required in the requisition, or if candidates do not enter answers for these criteria, the answers will still be considered. The candidates will be matched if they match all the other required criteria. Answering these criteria will help determine the position of the candidates on the candidates list.

## Matching Filters

Matching filters are:

- Submission Status: Do not invite candidates who have at least one submission with any of the selected statuses:
  - New
  - Reviewed
  - 1st, 2nd, 3rd Interview
  - Testing
  - Offer
  - Hired
  - Rejected
  - Declined
- Sourcing: Invite or not candidates:
  - Who have applied through any source type or source.
  - Who have applied at least once through any of the source types or sources selected.
- Other: Invite candidates from the following locations:
  - All countries
  - The requisition country
  - The requisition state/province
  - The requisition region
- A filter to invite candidates whose information has been modified during the last x months.
- A filter to invite internal candidates.

## Viewing Candidates Matching a Requisition

A user type permission grants users access to this feature.

The requisition must be posted on a career section.

1. In the requisition file, select the Posting and Sourcing tab.
2. In the Career Sections section, click Preview Matching Candidates.

The Posting Requisitions - Filter Matching Candidates window displays candidates matching the requisition.

## Modifying Matching Candidate Criteria

A user type permission grants users access to this feature.

The requisition must be posted on a career section.

1. In the requisition file, select the Posting and Sourcing tab.

2. In the Career Sections section, click Preview Matching Candidates.
3. In the Posting Requisitions - Filter Matching Candidates window, click the Modify Matching Criteria icon available in the Filters section on the left pane.
4. Modify criteria available in each tab.
5. Click Done.

In the Posting Requisitions - Filter Matching Candidates window, the list of candidates matching the requisition is updated according to the selected criteria.

## Modifying Matching Candidate Filters

A user type permission grants users access to this feature.

The requisition must be posted on a career section.

1. In the requisition file, select the Posting and Sourcing tab.
2. In the Career Sections section, click Preview Matching Candidates.
3. In the Posting Requisitions - Filter Matching Candidates window, selected the desired filters in the Filters section on the left pane.

In the Posting Requisitions - Filter Matching Candidates window, the list of candidates matching the requisition is updated according to the selected filters.

## Sending an E-mail to Candidates Matched to a Requisition

The requisition must be posted on a career section.

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

1. In the requisition file, select the Posting and Sourcing tab.
2. In the Career Sections section, click Modify.
3. In the Posting Requisitions window, select the option Email this job posting to matching candidates.
4. Click Done.

Candidates matched to the requisition will receive an email inviting them to apply for the job.

## Request More Information Alert

The Request More Information alert allows Recruiting Center users to send an email to candidates who meet certain conditions but whose submission is incomplete.

The message invites the candidates to return to their submissions and provide the missing information. The system determines automatically which information is missing by reviewing fields identified by your company at the time of implementation.

When setting the Request More Information alert, the options in the following tables are provided:

Option	Description
A candidate meeting all the required criteria achieves a result of at least x% (0/0)	This option is used to set the minimum result. Select a percentage from the list. At the right of the percentage, the system displays the number of points the candidate must have to match the selected percentage. When changing the percentage, the value to the right is recalculated. Candidates who meet all the required criteria and the result value will be considered ACE candidates.
A candidate meeting all the required criteria has at least x assets out of y	This option is used to set the minimum number of assets. Select a value from the list. Candidates who meet all the required criteria and the minimum number of assets will be considered ACE candidates.
Request information when candidate meets either condition	This option is used to notify candidates who meet the result or asset condition.
Request information when candidate meets both conditions	This option is used to notify candidates who meet the result and asset condition.

## Setting the Request More Information Alert

Use totals that are equal to or slightly lower than those you used in the ACE candidate alert section.

A user type permission grants users access to this feature.

1. Open a requisition file.
2. Click the Alerts tab.
3. In the Request More Information section, click Set Alert.
4. Select the desired criteria.
5. Click Done.

In the requisition Alerts tab, the criteria are displayed in the Request More Information section. An email is sent to candidates meeting certain conditions but whose application information is incomplete.

## Requisition Types

### Requisition/Staffing Type

A requisition (or staffing) type allows Recruiting Center users to determine the type of candidates that they want to hire.

These requisition types are available:

- Professional: Requisitions for most professional employees.
- Executive: Requisitions for executives. This type of requisition allows you to secure and protect private executive candidates in the system.
- Hourly: Requisitions for hourly employees.
- Campus: Requisitions for students or campus job fairs.
- Contingent: Requisitions for contractual employees submitted by agencies.
- Pipeline - General



- Pipeline - Executive

When creating a requisition, if more than one requisition type is activated, Recruiting Center users are asked to select the desired requisition type. When a requisition type is no longer available, it cannot be selected, but requisitions created with that type keep their original requisition type.

In the Requisitions list, a column called Requisition Type may be added if system administrators made it available in the requisition list format. Also, Requisition Type may be available as a search criteria in the Advanced Filters if made available by system administrators.

**Note:** When selecting Requisition Type in the Advanced Filters window, all requisition types are listed even if the Recruiting Center user has no access to some of those requisition types.

For Integration purposes: Campus requisitions and Hourly requisitions must be identified by Oracle in order for the integration team to change requisition type with a manual script. This will be allowed only once by customer. If more than one requisition type is active, import files must be modified.

## Changing the Type of a Requisition Template

A user type permission grants users access to this feature.

1. In the Libraries menu, select Templates.
2. Click on a template.
3. Click the Modify Requisition Type icon.
4. Select a requisition type.
5. Click Done.

The requisition template can now be used to create requisitions for the specified requisition type.

## Requisition Ownership

### Requisition Owner

Requisition ownership refers to the individuals chosen as the recruiter, the hiring manager, the recruiter assistant or the hiring manager assistant for a specific requisition.

To be available for a requisition, the recruiter assistant and the hiring manager assistant roles must be activated by your system administrator. These two assistant roles can carry out requisition-related activities to help out the recruiter or hiring manager while, from a reports perspective, the requisition is attributed to the recruiter and hiring manager.

When creating a requisition, you can choose a recruiter assistant and/or a hiring manager assistant. To modify the recruiter, the hiring manager, the recruiter assistant and the hiring manager assistant, you must be the owner of the requisition or have the *Reassign requisitions to owners and collaborators even if the user is not a owner* user type permission.

When viewing the Requisitions list, you can use the "I own" filter located on the left-hand side of the page to gain quick access to your requisitions. You can also use the advanced filters Recruiter, Hiring Manager, Recruiter Assistant, Hiring Manager Assistant to view requisitions owned by a specific user.

When notifications (such as attention indicator flags, workflow event notifications) are sent, the recruiter, the hiring manager as well as the assistants will receive them.

System-assigned tasks (such as To be completed, Ready for sourcing, Extend posting and To be filled) are assigned to the assistant (if an assistant was identified) instead of the recruiter. However, the recruiter also has access to these tasks even though they were assigned to the assistant.

The recruiter, recruiter assistant, hiring manager, hiring manager assistant chosen for the requisition as well as the creator of the approval path can terminate the approval path.

## Changing the Ownership of Requisition

The user must be the owner of the requisition or have the appropriate user type permission.

A user type permission grants users access to this feature.

1. Open a requisition file.
2. Click Edit.
3. In the Owners section, select new individuals as recruiter, hiring manager, recruiter assistant, and hiring manager assistant for the requisition.
4. Click Save and Close.

Notifications will be sent to the new owners of the requisition.

## Collaborator

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

To provide special access to a number of users throughout the requisition's life cycle, a Collaborator role is available. The Collaborator field must be activated by the system administrator.

Requisition owners (for example the recruiter, hiring manager, recruiter assistant and hiring manager assistant) can grant privileges and access to one or multiple users they identify as collaborators on their requisitions. The recruiter, the hiring manager and the assistants, if any, are the principal actors throughout the requisition's life cycle. Collaborators will help out or take responsibility for certain parts of the process.

Any user (not deleted) can be a collaborator, even non-Recruiting Center users (these users can be involved in the approval process with the use of the eShare Center).

When creating a requisition, a user can specify collaborators who would be responsible for selected steps within the requisition or recruitment process. If using the same individuals as collaborators, a user can create a list of frequent collaborators in the My Setup page. Once a list of frequent collaborators is created, these collaborators can quickly be added to requisitions by clicking the Add Frequent Collaborators button.

If a user wants to modify the collaborators added in a requisition, the user must be the owner of the requisition and have a permission to reassign requisitions to owners and collaborators even if the user is not the owner of the requisition.

When viewing the Requisition list, a user can use the "I collaborate on" quick filter located on the left-hand side of the page to gain quick access to requisitions they collaborate on.

## Adding a Collaborator in a Requisition

A user type permission grants users access to this feature.

The Owners section must be included in the requisition.

1. Open a requisition file.
2. In the Requisition tab of the requisition file, click Edit.
3. Click Add in the Collaborators section.
4. Select a user.
5. Click Done.

The name of the collaborator appears in the Collaborators section of the requisition.

## Deleting a Collaborator in a Requisition

A user type permission grants users access to this feature.

The Owners section must be included in the requisition.

Collaborators must have been included in the requisition.

1. Open a requisition file.
2. In the Requisition tab of the requisition file, click Edit.
3. Select a collaborator in the Collaborators section.
4. Click Delete.

The collaborator no longer appears in the Collaborators section of the requisition.

## Creating a List of Frequent Collaborators

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

The Collaborators field must be activated by the system administrator.

1. In the auxiliary navigation bar, click Resources, then My Setup.
2. In the Frequent Collaborators tab, click Add...
3. Select one or several collaborators.
4. Click Done.

Individuals with whom users will work on a regular basis regarding requisitions, i.e. collaborators, will appear in the Collaborators list. These collaborators will be available via the Add Frequent Collaborators button when creating a requisition.

## Adding a Collaborator to the Frequent Collaborators List

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

The Collaborator field must be activated by the system administrator.

1. In the auxiliary navigation bar, click Resources, then My Setup.
2. In the Frequent Collaborators tab, click Modify...
3. Select a collaborator.
4. Click Done.

The collaborator appears in the Collaborators list. The collaborator will be available via the Add Frequent Collaborators button when creating a requisition.

## Removing a Collaborator from the Frequent Collaborators List

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

The Collaborator field must be activated by the system administrator.

1. In the auxiliary navigation bar, click Resources, then My Setup.
2. In the Frequent Collaborators tab, click Modify...
3. Hover your mouse on the name of a collaborator.
4. Click the Remove icon.
5. Click Done.

The collaborator no longer appears in the Collaborators list. It will no longer be available via the Add Frequent Collaborators button when creating a requisition.

## Adding Frequent Collaborators in a Requisition

The list of frequent collaborators must be defined in the My Setup page.

A user type permission grants users access to this feature.

The Owners section must be included in the requisition.

1. Open a requisition file.
2. In the Requisition tab of the requisition file, click Edit.
3. Click Add Frequent Collaborators in the Collaborators section.

The list of frequent collaborators defined under My Setup appears in the Collaborators section.

## Suggested Users

The User Selector may contain an option to display suggested users.

The Suggested Users option is available when accessing the User Selector from a requisition and if the Collaborators field has been activated.

When selecting the Suggested Users option, the *owners* (recruiter, recruiter assistant, hiring manager, hiring manager assistant) and *collaborators* associated to the requisition are displayed. Only users who are able to complete the selected action are available for selection. For example, when requesting the approval of a requisition, only users who have the permission to approve requisitions are displayed.

## Displaying Suggested Users

1. In a requisition, click the Selector icon to open the User Selector.
2. In the Quick Filters panel, select the Suggested Users option. The list of suggested users is displayed.
3. Select the desired user.



# 4 Candidate Prescreening

## Prescreening

Recruiting Center users can use questions, competencies, and prescreening tools to find the ideal candidates.

The prescreening process may vary from one company to another. Below is a basic prescreening process.

Content owners create and store prescreening questions in the *Questions Library*.

Recruiters create requisitions and add questions from the Questions Library. If they were granted the permission, they can also create their own questions.

Recruiters can also add competencies in requisitions. Competencies are available in the *Competencies Library*.

Recruiters add sort settings so the answers to prescreening questions and competencies can be used to sort candidates. This is done by setting answers as Required, Asset, or blank. Recruiters can also add a weighting to give more considerations to certain questions or competencies. See *Required, Asset, and Weight Criteria*.

Recruiters write a good job description for the requisition to attract candidates. See *Requisition Description Writing Tips*.

Candidates apply on posted requisitions and answer prescreening questions.

Recruiters view the results on the candidates list and candidates meeting the threshold set on the *ACE Alert* are indicated with the Ace Candidate icon.

## Requisition's Prescreening Section

The Prescreening section in the requisition file may contain disqualification questions, competencies, and questions used to find the top candidates for a position.

The combination of these three elements is referred to as ACE Prescreening because they allow the system to identify ACE or top candidates for a position.

A *disqualification question* is a single-answer question that contains the minimum requirements for a candidate to be eligible for a job. A candidate not meeting the required response can be instantly exited from the application process. Disqualification questions are displayed in a requisition if the locations and job fields of the question matches the locations and job fields of the requisition.

*Competencies* are used to gather proficiency level and years of experience of a candidate in order to find the best candidate for a job. Competencies are supplied with the system, they are available in the Competencies Library and can be added in the Prescreening section of a requisition file.

*Prescreening questions* are used to prescreen candidates and find the best candidates for a job. Prescreening questions can be created in the Questions Library as well as within a requisition.

- Prescreening questions created in the Question library are available in the Question Library and can then be added in the Prescreening section of a requisition file.

- Prescreening questions created directly in a requisition are only available for the requisition and they are not available in the Question Library for other requisitions. If at a later date you use that same requisition to create a requisition template, the question that you created in the requisition will not be added to the Question library. However, if the question is created for a requisition template, then the question will be added to the library. Questions linked to a requisition are not duplicated in the requisition; they are re-used. Therefore, any changes made to such a question from the requisition will be applied to the question in the Question Library as well. These changes will therefore also appear in all requisitions to which this question is linked.

Competencies and questions are answered by candidates. The candidates' responses to the questions and competencies are filtered by the system and presented on the candidates list of the requisition. The Ace Candidate icon identifies top candidates, and the amount of requirements and assets that the candidate has achieved with their responses is also displayed. Users can then review the candidates list and have the option to reset the Required, Asset and Weight indicators as well as the *ACE alert* to modify the threshold if necessary to obtain a viable pool of top candidates.

## Competencies

When defining competencies for a requisition, several elements must be taken into consideration.

### Applying the Prescreening Model

When defining competencies for a requisition, users can apply the pre-defined model of competencies and questions associated with the requisition. When clicking **Apply Model**, competencies and questions that match one location or one job field of the requisition are added to the requisition.

### Minimum Proficiency Level

When competencies are added to a requisition, users can specify the minimum proficiency level required. Available values are:

- None
- Beginner
- Intermediate
- Advanced
- Expert

For details, see *Competency Assessment Definitions*.

System administrators can define if competency proficiency levels can be selected by users when creating a requisition. Three configurations are available:

Simple format: When this option is selected, users cannot select the minimum proficiency level of a competency.



## 5. Prescreening

Competencies

This requisition uses 0 of the 8 competencies and questions from the corresponding prescreening model. Apply Model

+ Add - Remove ↕ Reorder

Competency	Required/Asset	Weight
<input checked="" type="checkbox"/> 1 4th generation language (4GL)	Not Applicable	0 (0%)

Detailed format: When this option is selected, users can select the minimum proficiency level of a competency as well as the minimum years of experience required.

## 5. Prescreening

Competencies

This requisition uses 0 of the 8 competencies and questions from the corresponding prescreening model. Apply Model

+ Add - Remove ↕ Reorder

Competency	Required/Asset	Min. Proficiency	Min. Experience	Weight
<input checked="" type="checkbox"/> 1 4th generation language (4GL)	Required	Advanced	5 years or +	0 (0%)

Questions

+ Add - Remove ↕ Reorder 📄 📄 📄

Simple or Detailed: When this option is selected, users must select the option Modify the minimum requirements of proficiency and experience before being able to select a minimum proficiency level of a competency and the minimum years of experience required.

## 5. Prescreening

Competencies

This requisition uses 0 of the 8 competencies and questions from the corresponding prescreening model. Apply Model

+ Add - Remove ↕ Reorder

**Modify the minimum requirements of proficiency and experience (Intermediate, 1-3 years)**

Competency

Competency	Required/Asset	Min. Proficiency	Min. Experience	Weight
<input type="checkbox"/> 1 4th generation language (4GL)	Required	Advanced	5 years or +	0 (0%)

Questions

+ Add - Remove ↕ Reorder 📄 📄 📄

If using the Simple format, a minimum baseline needs to be established for the entire organization. This is done by the system administrators. This baseline defines the minimum levels of proficiency and experience needed for a candidate to "have" a competency. In career sections, a statement is displayed to candidates explaining what constitutes "having a competency" in terms of your global baseline - there's only a single check box to mark if they "have" that competency.

If using the Detailed format or the Simple or Detailed format, candidates are asked to select their proficiency, experience, when the competency was last used, and their interest level in that competency. Explanations of the different choices are displayed to candidates in the career section.

### Minimum Experience

When selecting a proficiency, users need to set the minimum experience required for the competency. Available values are:

- None
- Less than 1 year
- 1 to 3 years
- 3 to 5 years
- 5 years +

For details, see [Competency Definitions](#).

### Required, Asset, and Weight

When adding competencies to a requisition, users need to specify if the competency is required for the position or if it is an asset. Weight can also be added to competencies to give them more consideration when prescreening candidates. See [Required, Asset, and Weight Criteria](#).

## Required, Asset and Weight Criteria

When adding questions and competencies to a requisition, users need to specify if the question or competency is required for the position or if it is an asset. Weight can also be added to questions and competencies to give them more consideration when prescreening candidates.

### Required and Asset Criteria

A required criterion means that the competency or answer to a question absolutely has to be selected for the candidate to be considered for the job. Think "Minimum Requirements". Are there any circumstances where this qualification could be waived? Goal: All hires have all Required qualifications.

An asset criterion means that the competency or answer to a question does not have to be selected for the candidate to be considered for the job, but would distinguish this candidate compared to others. Think "Strongly Preferred" and "Nice-to-Have" qualifications. Goal: Identify enough Assets to separate "minimally qualified" candidates from "ideal" candidates (ACE Candidates). A best practice is to identify Required criteria first and then identify and select any Asset criteria. When some assets are "Strongly Preferred" and others are "Nice-to-Have", use weight to differentiate.

Example 1: Question 1 is a single answer question, the candidate will only check one answer. If a Bachelor's Degree is required, you must mark that answer and all answers greater than that answer as required. If you do not do this, a candidate that answers Master's degree will not be recorded by the system as having met the requirement, even though candidates with a Master's degree do meet the minimum requirement.

Question 1: Indicate the highest level of education you have completed.

- High School
- Associate's Degree

- Bachelor's Degree — Required
- Master's Degree — Required
- PhD — Required
- None of the above

Example 2: Question 2 is a single answer question, the candidate will only check one answer. If a minimum of 2 years of experience is required, you must mark "1 to 3 years" and all answers greater than that answer as required. If you do not do this, a candidate that answers "3 to 6 years" will not be recorded by the system as having met the requirement, even though those candidates have at least 3 years of experience and thus do meet the minimum requirement.

Question 2: How many years of experience do you have in Java programming..

- No experience
- Less than 1 year
- 1 to 3 years — Required
- 3 to 6 years — Required
- 6 to 10 years — Required
- More than 10 years — Required

### Weight Criteria

Weight is a numerical value added to a required or asset competency or answer to a question to give it more consideration when prescreening candidates. The weight criterion is an optional third level filter. To use weighting, users assign a certain number of "points" to the answer they want to weight. Goal: Keep it simple! Weighting is used to refine requirements and assets, so it should be used selectively.

Weighting can be helpful with a high volume requisition as there will be more questions and users will need to have extensive filtering of the Candidate list.

Weight can be assigned to a question having a single answer or a question having multiple answers.

There is no limit to the number of points that can be awarded or the number of answers that can have points. Once the points are assigned, the system automatically calculates a percentage. This percentage is the amount that question earns relative to the entire questionnaire. Since these percentages add up to 100%, you can assume these were the only points assigned on this entire questionnaire. All point percentages will be normalized and add up to 100% at the bottom of the prescreening questionnaire.

If users decide to use weighting either because they have a high volume requisition or wish to utilize the third level of filtering, there are some basic usage tips to keep in mind to know what to weight:

- First determine what answers need points. Not all questions or answers need weighting.
- Only weight assets not requirements, and only those assets that really need to stand out from the others in order to sort your ideal candidates to the top of the list.
- One exception to the asset rule is you can put weighting on single answer requirements if the questions are minimum or greater like we saw earlier.
- Another exception is if the Prescreening requirement column is strictly used for OFCCP compliance, then typically assets are not used, and some organizations may want to use weighting in that case to help sort the list.

Example 1: Question 1 is a multiple answer question where you may have several assets. Weighting helps you identify preferred, or super, assets over other assets listed. Here we see MS Project is the most important asset out of the 4 assets. 3 out of the 4 assets are weighted with extra points. When utilizing a list that includes requirements and assets,

never assign weighting to requirements. The candidate will either meet the requirement or not, adding weight to a requirement listed here does not assist in providing further differentiation from other candidates. The total weighting for this question is 100%, so you can assume in this example, that this is the only question weighted on the whole questionnaire. If a candidate selected all the assets with weighting they would receive 6 asset points or a 100% result.

Question 1: Indicate which computer applications you have used to perform your job duties in the past. Select all that apply.

- MS Access
- MS Word — Required
- MS Excel — Required
- MS Publisher — Asset, Weight: 1 (17%)
- MS Project — Asset, Weight: 3 (50%)
- Adobe Acrobat — Asset, Weight: 2 (33%)
- Adobe Pagemaker — Asset
- None of the above
- Total for Competencies and Questions — Weight: 6 (100%)
- 

Example 2: Question 2 is a single answer question. The one exception where you would weight requirements is on a question like this one. In this example, we are hiring a junior level HR Generalist, so a preferred level of years experience is indicated even though anyone with one or more years of experience would meet the requirement. Here, we see that 3-5 years is the most desirable out of all the choices. The 5-7 years is a medium level. And the over 7 years gets the least amount of points as they may be overqualified.

Question 2: How many years of experience do you have as a Human Resources Generalist?

- No experience
- Less than one year
- More than 1 year and less than 3 years — Required
- More than 3 years and less than 5 years — Required, Weight: 3 (100%)
- More than 5 years and less than 7 years— Required, Weight: 2 (67%)
- More than 7 years — Required, Weight: 1 (33%)

### Tips

- Identify Required criteria first and then identify and select any Asset criteria.
- When some assets are "Strongly Preferred" and others are "Nice-to-Have", use weight to differentiate them.
- When starting out, use Required and Asset only and NOT Weight.
- Use weight when they are many assets and you want to indicate some are more important than others.

## Competency Assessment Definitions

Proficiency Level	
None	Candidates have no experience or training regarding the competency.
Beginner	Candidates have received basic training and can perform the competency with some assistance. They received classroom or field training, either as an apprentice or through an internship.
Intermediate	Candidates have completed at least one successful experience. Help from an expert may be required occasionally, but candidates can usually perform the competency themselves.
Advanced	Candidates can perform the competency without any assistance. They are recognized within their company as "the people to ask" regarding the competency. They might be known in the industry as a specialist. They have extensive experience and could teach the subject if they had teaching competencies.
Expert	Candidates can answer all questions about the competency and industry-related questions. They have contributed to developing, defining, or improving the competency. They have published a paper on the subject and advanced people actively seek their advice. They are often offered jobs.

Experience Level	
None	Candidates have no experience or training regarding the competency.
Less than 1 year	Candidates possess between 1 and 11 months of work experience during which they had to perform the competency.
1 to 3 years	Candidates possess between 12 and 35 months of work experience during which they had to perform the competency.
3 to 5 years	Candidates possess between 36 and 59 months of work experience during which they had to perform the competency.
5 years +	Candidates possess 60 months or more of work experience during which they had to perform the competency.

Last Used Level	
None	Candidates have never performed the competency.
Current	Candidates perform the competency as part of their current employment.
Last Year	Candidates successfully performed the competency within the last 11 months.
1 to 3 years ago	Candidates successfully performed the competency between 12 and 35 months ago.
3 to 5 years ago	Candidates successfully performed the competency between 36 and 59 months ago.

Interest Level	
None	Candidates have absolutely no interest in performing or learning the competency.
Low	Candidates have a lot of experience and key knowledge regarding the competency but have little interest in performing the competency often.
Medium	Candidates would be willing to perform the competency daily in their job.
High	Candidates have a high interest in jobs that require them to perform the competency. Performing the competency is a high source of motivation. They are willing to participate in improving how the competency is performed at the company.

## ACE Candidate Filtering

Several tools are available to filter ACE candidates.

**Sorting ACE Candidates:** The candidates list of a specific requisition contains the ACE column. Candidates with this icon are ACE candidates. You can sort the candidate list by ACE candidates. You can also use the "Requirements", "Assets Met X/Y" and "Result" columns to sort candidates.

**Using Quick Filters:** The "ACE" filter available on the left hand side of the page can help you to only display ACE candidates for a requisition. The "Meets required criteria" is another way to quickly filter your Candidate list to show active candidates who meet all the required criteria of the Prescreening section of the requisition file. You can also use the "Assets Met" and "Results between (%)" features to filter your list.

**Adjusting Required and Asset Criteria:** If your Candidate list shows too many or too few ACE candidates, you can go back to the requisition Prescreening section and adjust the Required and Asset criteria. You may realize that a response you marked as an asset should have been marked as a requirement.

**Updating the ACE Alert:** If you do adjust the Required and Asset criteria, then you need to review the ACE Alert. You may need to adjust the selections of assets or adjust overall settings based on the modifications you made in the requisition Prescreening section.

## Requisition's Prescreening Section - Competencies and Questions Actions

### Applying Competency and Question Model

A user type permission grants users access to this feature.

The requisition must not be posted.

1. In the requisition file, click the Requisition tab.

2. Click Edit.
3. In the Prescreening section, locate the Competencies section.
4. Click Apply Model.
5. Click Save and Close.

Questions and competencies that match one location or one job field of the requisition are added to the requisition.

## Adding a Competency to a Requisition

A user type permission grants users access to this feature.

The requisition must not be posted.

1. In a requisition file, click Edit.
2. In the Competencies section, click Add.
3. Select a competency.
4. Click Done.
5. Click Save and Close.

The competency appears in the Competencies section of the requisition file.

## Removing a Competency from a Requisition

A user type permission grants users access to this feature.

The requisition must not be posted.

1. In a requisition file, click Edit.
2. In the Competencies section, select a competency.
3. Click Remove.
4. Click Save and Close.

The selected competency no longer appears in the Competencies section of the requisition.

## Ordering Competencies in a Requisition

A user type permission grants users access to this feature.

The requisition must not be posted.

1. In a requisition file, click Edit.
2. In the Competencies section, for each competency, select an order number from the list.
3. Click Reorder.
4. Click Save and Close.

## Defining Competency Criteria

A user type permission grants users access to this feature.

The requisition must not be posted.

1. In the requisition file, click the Requisition tab.
2. Click Edit.
3. In the Competencies section, indicate if the competency is Required or an Asset.
4. Click Save and Close.

## Modifying the Minimum Requirements for Competencies

A user type permission grants users access to this feature.

The requisition must not be posted.

1. In a requisition file, click Edit.
2. In the Competencies section, select the option "Modify the minimum requirements of proficiency and experience (Intermediate, 1-3 years)".
3. Change the Min. Proficiency and/or Min. Experience values.
4. Click Done.
5. Click Save and Close.

## Adding a Question to a Requisition File

A user type permission grants users access to this feature.

The requisition must not be posted.

1. In a requisition file, click Edit.
2. In the Questions section, click Add.
3. Select a question.
4. Click Done.
5. Click Save and Close.

The question appears in the Questions section of the requisition file.

## Removing a Question from a Requisition File

A user type permission grants users access to this feature.

The requisition must not be posted.

1. In a requisition file, click Edit.
2. In the Questions section, select a question.



3. Click Remove.
4. Click Save and Close.

The selected question no longer appears in the Questions section of the requisition.

## Ordering Questions in a Requisition File

A user type permission grants users access to this feature.

The requisition must not be posted.

1. In a requisition file, click Edit.
2. In the Questions section, for each question select an order number from the drop down list.
3. Click Reorder.
4. Click Save and Close.

## Defining Question Criteria

A user type permission grants users access to this feature.

The requisition must not be posted.

1. In the requisition file, select the Requisition tab.
2. Click Edit.
3. In the Questions section, specify if the question is Required or an Asset.
4. Click Save and Close.

## Creating a Question for a Requisition

A user type permission grants users access to this feature.

The requisition must not be posted.

1. In the requisition file, click the Requisition tab.
2. Click Edit.
3. In the Prescreening – Questions section, click the Create Question icon.
4. Complete the fields.
5. Click Save and Close.

The question is added to the requisition. The question is not added to the Question Library therefore not available for other requisitions.

## Duplicating a Question for a Requisition

A user type permission grants users access to this feature.

The requisition must not be posted.

1. In the requisition file, select the Requisition tab.
2. Click Edit.
3. In the Prescreening – Questions section, click the Duplicate Question icon.
4. Complete the fields.
5. Click Save and Close.

The question is added to the requisition. The question is not added to the Question Library therefore not available for other requisitions.

## ACE Candidate Alert

The ACE candidate alert allows Recruiting Center users to set a threshold to identify the ideal candidates and to send an email to specific recipients to inform them that ACE candidates were found.

The ACE candidate alert allows the system to identify the candidates who achieve or exceed the ACE alert threshold for a job offer. It identifies top candidates based on their responses to the competencies and questions in the Prescreening section of the requisition file. The ACE candidate alert is based on Required and Asset criteria. Candidates are divided into three groups to help users determine which candidate files to review first:

- ACE candidates: Consider these candidates first because they meet all Required criteria and some Asset criteria.
- Minimally qualified candidates: Consider these candidates after the ACE candidates because they meet all Required criteria but not Asset criteria.
- Other candidates: Do not consider these candidates because they do not meet any Required criteria.

**Note:** A best practice is to always have the ACE candidate alert activated.

When setting the ACE candidate alert, the options presented in the following table are provided:

Option	Description
A candidate meeting all the required criteria achieves a result of at least x% (0/0)	This option is used to set the minimum result. Select a percentage from the list. At the right of the percentage, the system displays the number of points the candidate must have to match the selected percentage. When changing the percentage, the value to the right is recalculated. Candidates who meet all the required criteria and the result value will be considered ACE candidates. Do not use the percentage weighting option if you do not use the Weight criterion in the Prescreening section of the requisition file. If you utilized weighting on some of the questions you could, if you wish, incorporate into the ACE candidate alert setting as well. For a simple approach, you can start by using 75% weight result and then eventually align that % with your own approach and utilization of weighting that works best for you.
A candidate meeting all the required criteria has at least x assets out of y	This option is used to set the minimum number of assets. Select a value from the list. Candidates who meet all the required criteria and the minimum number of assets will be considered ACE candidates.
Identify a candidate as an ACE when either condition is met	This option is used to identify ACE candidates using the result or asset condition.
Identify a candidate as an ACE when both conditions are met	This option is used to identify ACE candidates using the result and asset conditions.

When setting the ACE candidate alert, Recruiting Center users have the option to send an email to notify specific recipients that an ACE candidate was found. To be an ACE Candidate Alert recipient, a user must meet all these criteria:

- The user must be active.
- The user must have access the Recruiting Center or eShare Response Center.
- The user has access to the requisition type of the requisition.
- The user belongs to the user group of the requisition.

Recruiting Center users can be set up as an ACE Candidate Alert recipient even if they have limited access to information on the candidate file.

All ACE Candidate Alert recipients receive the same candidate file, regardless of permissions to view candidate information in the system. When an ACE Candidate Alert is set, the recipient receives an email with an attached PDF file that contains data from the candidate file. Sections of the candidate file that contain no data do not appear. All PDF files display information as follows regardless of the user's permissions:

- Fields with the General or Restricted security level are displayed. Fields with the Confidential security level are not displayed.
- Labels in the candidate file are displayed in the Recipient's language if there is only one recipient; otherwise labels are displayed in the requisition's base language.
- Values entered in the candidate file are displayed in the job submission language.
- The Regulations block is not included.
- Screening Services results are not included.
- Candidate attachments are not included.

## Setting the ACE Candidate Alert

A best practice is to always activate the ACE candidate alert.

When setting the ACE candidate alert, answer the prescreening competencies and questions as your ideal candidate would. Then calculate the total assets and weight to determine the ACE threshold.

A user type permission grants users access to this feature.

1. Open a requisition file.
2. Click the Alerts tab.
3. In the ACE Candidate Alert section, click Modify Alert.
4. In the ACE Candidate Alert page, select the desired criteria.
5. Click Next.
6. In the Ace Candidate Alert window, select the desired recipients.

The user who created the requisition is added by default to the list of recipients, but can be removed. There is no limit regarding the number of recipients that can be added.

7. Click Done.

In the requisition Alerts tab, the criteria and recipients are displayed in the ACE Candidate Alert section.

## Adding a Recipient to an ACE Alert

A user type permission grants users access to this feature.

1. In the requisition file, click the Alerts tab.
2. In the ACE Candidate Alert section, click Modify Alert.
3. Click Next.
4. In the Ace Candidate Alert window, select the desired recipients.
5. Click Done.

The selected recipient will appear in the list of recipients that will receive an ACE alert.

## Removing a Recipient from an ACE Alert

A user type permission grants users access to this feature.

1. In the requisition file, click the Alerts tab.
2. In the ACE Candidate Alert section, click Modify Alert.
3. In the ACE Candidate Alert window, click Next.
4. In the Ace Candidate Alert window, browse mouse over the name of a recipient.
5. Click the Remove icon.
6. Click Done.

The recipient no longer appears in the list of recipients of the ACE alert.

# 5 Posting and Sourcing

## Posting and Sourcing

Requisition posting consists of publishing a requisition to have candidates applying on the job.

When a requisition has been created and approved, the next step is to post it. Here is a basic posting and sourcing process. System administrators create a Source Tracking list which is used by recruiters and candidates. Recruiters post requisitions to Career Sections. Recruiters can post to additional sources such as job boards, agencies and also use gateways to send out requests for sourcing help. Candidates apply to jobs and complete the Source Tracking information. Some tracking is automated if the candidates are coming from certain job boards. They can also put in event ID's from advertisements. Once the source of the candidate is tracked, recruiters then can view the information in the candidate file.

### Accessing the Posting and Sourcing feature

There are several ways to access the Posting and Sourcing feature:

- When a requisition is ready for posting or already posted, you can click the Status Detail link in the requisitions list and you will be taken to the Posting and Sourcing tab of the requisition.
- From the More Actions menu within the requisition file.
- From the Posting and Sourcing tab within the requisition file.
- From the Contextual Action menu in the requisitions list.
- From the Tasks channel, the Ready for Sourcing link will take you directly to a list of requisitions that need to be posted.

### Places and services to post requisitions

Depending on what your organization has activated and your permissions, the Posting and Sourcing feature provides several services to post requisitions:

- Internal or external career sections.
- Mobile career sections: Customers can specify if a career section can be accessed from mobile devices. When candidates receive a message on their mobile device regarding a new job opening and decide to take a look at the job while using their mobile device, candidates are automatically redirected to the mobile career section and are able to view and apply for the job. System administrators specify if the career section is a mobile career section and then link the standard career section to a mobile career section. When a requisition is posted to a standard career section, the system automatically posts the requisition to the mobile career section to which the standard career section is linked. In the Recruiting Center, when posting a requisition, the mobile career section to which a standard career section is linked is not displayed in the Career Sections list. This is to prevent users from posting requisitions directly to a mobile career section.
- eQuest job boards: Recruiters can post their requisitions to multiple job boards through the eQuest job distribution portal. Recruiters must post a requisition on a career section before posting the requisition to a job board. A requisition can be posted as many times as required but it cannot be posted twice on the same job board account. All job board accounts to which a requisition is already posted will be unavailable in the Sourcing

Manager page. The requisition must be posted on an external company career section for at least the same time as on eQuest job board account.

- Certified job posting distribution suppliers: Recruiters can select a certified job posting distribution supplier (other than eQuest) that will distribute job postings through job boards. A new type of Oracle Validated Integration (OVI) has been put in place to allow integrations with job posting distribution suppliers. Recruiters must post a requisition on a career section that is external and public before posting the requisition to a job board.
- Staffing agents: Users can ask an advertising agency to post an ad.
- Non-electronic media such as newspapers, magazines and trade publications, billboards and broadcasting. A list of preferred non-electronic media can be created in My Setup, under Preferences.
- Gateways such as internet mining.

### Important information about Mobile career sections

When posting a requisition, the system dynamically calculates the posting start date and end date for the mobile career section. The posting start date and end date on the mobile career section are based on the dates of the standard career section to which the mobile career section is linked.

- If the mobile career section is linked to a single standard career section, the posting start date and end date of the standard career section are used.
- If the mobile career section is linked to multiple standard career sections, the earliest start date among the standard career sections is used; the latest end date among the standard career sections is used.

When posting a requisition to a standard career section, the requisition is simultaneously posted to the mobile career section to which the standard career section is linked (if applicable). However, when a standard career section is linked for the first time to a mobile career section, all requisitions currently posted on the standard career section will be posted to the mobile career section. This posting process is set up to start a few minutes after the two career sections are linked and the duration required to post the requisitions will depend on the volume of postings available on the standard career section.

## Posting a Requisition on a Career Section

A user type permission grants users access to this feature.

The requisition must have one of the following statuses: Open - Approved, Open - Unposted, Open - Expired.

There must be no Organization, Location and Job Field associated to the Career Section or, the Organization, Location and Job Field of the requisition and the Career Section must match.

The career section must be active.

1. In the requisition file, select the Posting and Sourcing tab.
2. In the Career Sections section, click Modify.
3. Decide if you want to post the requisition to internal and/or external career sections.  
The Visibility column indicates whether a career section can be viewed by the external public, or just your internal employees.
4. Choose the desired career section by selecting the checkbox on the right end side.
5. Select the posting start date and end date for the desired career section.  
Posting start date and end date defaults can be set up by the system administrator, but you can modify these at posting time if needed.
6. Select the "Post as urgent need" option if desired. The job will appear with a red exclamation point when posted on the career section indicating it is an urgent need.

7. If you want to send an email to candidates whose profile information matches your requisition, select the option "Email this job posting to matching candidates".
8. Click Done.

The status of the requisition is Posted. Information regarding the posting is displayed in the requisition Posting and Sourcing tab, under Career Sections. Once a requisition has been posted, candidates can start applying.

## Requisition Posting via eQuest Job Boards

Recruiters can post their requisitions to multiple job boards through the eQuest job distribution portal.

eQuest job board accounts are created by the system administrator. These accounts must first have been created in eQuest, with the same user name and password defined by the system administrator. Therefore, job boards available for a specific account are set by eQuest. The system administrator can create as many accounts as needed. However, only one account can be designated as the default account.

A list of core job boards is bundled with the Recruiting Cloud Service subscription. Customers must work with eQuest for additional job boards. This list is subject to change.

- **Monster** - All US and International locations.
- **USAJOBS** - United States.
- **CareerBuilder** - United States.
- **LinkedIn** - All US and International locations.
- **Workopolis** - Canada.
- **SEEK** - Asia Pacific.
- **Wildcard** - Two additional job boards may be selected from eQuest's current list of electronically supported job boards at inception of their Taleo contract ("Additional Core Board"). eQuest will support a process to allow customers to change their Additional Core Boards up to one time per year following the customer's first anniversary date of contract with eQuest.

In the event that a customer requests the delivery of job postings to a job board that is not in the above list, such request may be referred to eQuest to be managed via a direct contract between eQuest and the customer.

Once the Oracle Taleo Enterprise Edition integration setup is completed for eQuest, eQuest will work directly with the customer to collect appropriate credentials and complete setup to any core job boards or non-core job boards and any related configuration for customer reporting and analytics. eQuest will provide customers with an Activity Report each month listing key data elements associated with each job posting, including date of insertion, recruiter name, requisition number, job title and job location, and total eQuest transactions for the prior month.

## Posting a Requisition on a Job Board

A user type permission grants users access to this feature.

The requisition must have the following status: Open - Posted.

A requisition must be posted on a career section before being posted on eQuest.

1. In the requisition file, select the Posting and Sourcing tab.
2. In the Job Boards section, select eQuest in the supplier drop-down list.

3. Select an account.
4. Click Post...
5. Complete the information requested by eQuest.
6. Click Submit.

The status of the requisition is Posted. Information regarding the posting is displayed in the requisition Job Boards section. Once a requisition has been posted, candidates can start applying.

The eQuest feature brings the user to another service which is not the responsibility of Oracle. Posting requisitions on certain job boards through eQuest may imply additional costs and fees independent of the services offered by Oracle. The selections you make will be effective once you quit the eQuest portal and return to Recruiting. Once postings have been made, information on dates and status will be available in the requisition Posting and Sourcing tab.

## Posting a Requisition on a Job Board with a Future Start Date

A user type permission grants users access to this feature.

The requisition must have the following status: Open - Posted.

A requisition must be posted on a career section that is external and public before posting the requisition to a job board.

1. In the requisition file, enter a date later than the current day's date in the Opening Date field.
2. Select the Posting and Sourcing tab.
3. Post the requisition on an internal career section that is unavailable to both internal and external candidates, specifying today's date in the Start Date field.
4. In the Job Boards section, post the job to eQuest, specifying the future date on which you want the job to be displayed on the job board.

## Requisition Posting via Certified Job Posting Distribution Suppliers

A new type of Oracle Validated Integration (OVI) has been put in place to allow integrations with job posting distribution suppliers so that customers can select their suppliers of choice.

Customers first need to sign a contract with their job posting distribution suppliers of choice. The supplier must have worked with Oracle to provide a certified integration. If such an integration is available for the desired supplier, customers can request the integration to be made available on their zone. Then, Recruiting Center users who have the permission to distribute job postings to job boards are able to select these certified job posting distribution suppliers.

Recruiters can select certified job posting distribution suppliers via the Job Boards section, under the requisition Posting and Sourcing tab. To post a requisition to a job posting distribution supplier, recruiters must first post the requisition on a career section that is external and public.

After selecting a supplier and account and clicking the Post button, recruiters are asked to select a language if the integration was configured to distribute requisitions in multiple languages. The requisition content provided to the job posting distribution supplier is provided in the selected language.

Recruiters are then taken to a page where they need to provide different information. The main part of the page is provided by the supplier. Some of the requisition information is automatically provided to the supplier, making it possible to pre-fill some fields requested by the supplier. When recruiters are done completing the information, they are



taken back to the Recruiting Center Posting and Sourcing tab and the list of job board postings is updated to show the job boards where the requisition has been posted.

The list of job board postings shows all the job boards on which a requisition is posted, unposted, scheduled to be posted, etc. The following information and actions related to a job posting distribution supplier are available:

- **Supplier:** Shows the various suppliers that are active on the zone, certified job posting distribution suppliers or eQuest.
- **Account:** Shows the accounts available to the current user. The Account list is sorted to show the most relevant account for the user (based on the information configured on the user account).
- **Job Board:** Name of the job board.
- **Language:** Language in which the requisition was posted on the job board.
- **Status:** Status of the job board. See below for a complete list of possible statuses.
- **Start Date:** Requisition posting start date.
- **End Date:** Requisition posting end date.
- **Post:** The Post button launches the job distribution process for the requisition. The posting is performed by using the selected supplier and account. It is possible to Post the same requisition using multiple suppliers and/or accounts. This requires the user to repeat the posting process multiple times.
- **Unpost:** The Unpost button makes it possible to unpost the requisition from individual job boards. An unpost request is sent to the job posting distribution supplier and the requisition is unposted. No further action is required by the user.
- **Unpost All:** The Unpost All button unposts the requisition from all job boards where it is currently posted. An unpost request is sent to the job posting distribution supplier and the requisition is unposted. No further action is required by the user.
- **Refresh Status:** The Refresh Status button updates the information displayed in the Job Boards list. The information in this list is not updated automatically (unless an action such as Unpost is performed). Users need to click the Refresh Status button to get the most up to date information.

Possible status values for jobs posted via a job posting distribution supplier are as follows:

- Not posted
- Incomplete
- Authorization required
- Scheduled for posting
- Being processed
- Posting request in process
- Posted
- Posted - User update incomplete
- Posted - Unposting request in process
- Posted - Update request in process
- Posted - Update authorization required
- Unposted
- Expired
- Error

In the requisition file History tab, three different types of events can be created by the job distribution feature:

- Requisition Posting (Job Board ): Used when the user clicks on the Post button.
- Requisition Unposting (Job Board ): Used when the user clicks on the Unpost or Unpost All button.
- Requisition Posting Status Change: Used when the status displayed for a posting on a job board changes, whatever the status is Posted, Expired, Unposted, Error, etc.

**Note:** Some customers may have created Private career sections that are not available via their company's Web site. These Private career sections are used primarily to invite specific candidates to provide, via a job specific URL, additional information on their job submission. Private career sections normally display jobs longer than Standard career sections. There may be situations where a requisition is posted to a job posting distribution supplier and candidates are redirected to a Private career section because the job is no longer posted on a Standard career section and the lowest career section sequence was taken into consideration (order in which the system evaluates on which career section to redirect a candidate coming from a job specific URL). A candidate may click on a job and be redirected to a Private career section, the only career section that is still posting the job. This behavior will be enhanced in a coming release. The plan is to automatically redirect candidates to a career section URL that will not consider Private career sections. The career section sequence will continue to be used, but only Public career sections will be considered.

## Posting a Requisition on a Certified Job Posting Distribution Supplier

A user type permission grants users access to this feature.

The requisition must have the following status: Open - Posted.

A requisition must be posted on a career section that is external and public before posting the requisition to a job board.

1. In the requisition file, select the Posting and Sourcing tab.
2. In the Job Boards section, select a supplier and an account.
3. Click Post.
4. Complete the information requested by the supplier.
5. Click Submit.

The status of the requisition is Posted. Information regarding the posting is displayed in the requisition Job Boards section. Once a requisition has been posted, candidates can start applying.

## Requisition Posting via a Staffing Agent

Posting a requisition via staffing agents involves many actions such as the creation of the agency portal, application flows, agencies and agents, as well as many actors such as the system administrator, the user, the agent, and the candidate.

Agency portals (or career sections of type Agency) provide a fully integrated solution that enables organizations to deal directly with staffing agencies. This feature helps ensure the privacy of the organization's candidates and jobs by providing an agency-dedicated application flow within one or multiple agency portals.

The posting of a requisition via posting agents involves the following.

After creating a requisition, a recruiter can decide to use staffing agents to find candidates for the job. The list of agents available is dependent on the organization, location, and job field selected for the requisition. The recruiter can select one or several staffing agents who will post the requisition on their job list, then determine the start and end time when candidate referrals will be allowed. This process can take place after the requisition is opened but before it is posted to internal or external career sections as agents will be accessing the requisition through their own career section (agency portal).

An email is sent to staffing agents inviting them to refer candidates for the job. The staffing agent signs in to the agency portal, locates the requisition and refers a candidate. Depending on granted permissions, the staffing agent can refer candidates who already exist in the database or refer an already referred candidate at the job submission level.

**Note:** When changing the agent who referred a candidate, if you want to reselect the original referring agent and the original ownership is expired, the change will not take effect unless a different agent is first selected and then another modification is made to reselect the original agent.

Candidates being referred receive an email informing them that they were referred by an agent for a job and inviting them to review the profile information submitted by the agent.

Later, when searching through the candidate database, the recruiter can easily identify candidates referred by an agent with the Referred by Agent icon. The tracking tab of the candidate file also displays the name of the agency and that of the agent who referred the candidate. Candidates referred by an agent are considered agent-owned candidates. However, the user can remove the agent-ownership. The user has the possibility to perform a duplicate check to see if the candidate already exist in the database.

## Inviting an Agent to Refer Candidates

A user type permission grants users access to this feature.

The requisition must be Approved.

1. In the requisition file, select the Posting and Sourcing tab.
2. In the Staffing Agents section, click Modify.
3. Select an agent.

If no agents appear in the Agent Selector window, check with your system administrator to ensure the proper career section and agents have been created.

4. Select start and end dates, for the agent.
5. Click Post.
6. Click Done.

The agent has been invited to refer candidates for the requisition available in an organization. Once a requisition has been posted to an agent, the Remove button is no longer be available in the Actions column.

## Posting a Requisition to Non-Electronic Media

A user type permission grants users access to this feature.

The requisition must be posted on a career section. The requisition must have the following status: Open - Approved.

When posting a requisition to a non-electronic media, some pieces of information are missing such as default agency, requisition details, OLF, hiring manager, description, qualifications and correspondence preview. It is recommended that users review the requisition details before posting to any of these posting options.

1. In the requisition file, select the Posting and Sourcing tab.
2. In the Non-Electronic Media section, click Request Service.
3. Select a medium.

If you want to select a medium amongst your preferred non-electronic media, select the option Preferred non-electronic media located on the left pane.

4. Specify the start date and end date of the posting.
5. Click Next.
6. In the Posting Requisitions page, select the agency that will post the job ad.
7. Click Done.

The agency will receive a request to post the requisition to the selected non-electronic media such as newspapers, magazines, billboards, etc.

## Requesting Resume Searching

A user type permission grants users access to this feature.

The requisition must have one of the following statuses: Open - Approved, Open - Scheduled, Open - Posted, Open - Unposted, Open - Expired.

When requesting resume searching (Internet Mining), some pieces of information are missing such as default agency, requisition details, OLF, hiring manager, description, qualifications and correspondence preview. It is recommended that users review the requisition details before posting to any of these posting options.

1. In the requisition file, select the Posting and Sourcing tab.
2. In the Internet Mining section, click Request Service.
3. In the Posting Requisitions page, select an agency.
4. Click Done.

The agency will receive a request to search for resumes over the internet.

## Requesting Sourcing Strategy

A user type permission grants users access to this feature.

The requisition must have the following status: Open - Approved.

When requesting a sourcing strategy, some pieces of information are missing such as default agency, requisition details, OLF, hiring manager, description, qualifications and correspondence preview. It is recommended that users review the requisition details before posting to any of these posting options.

1. In the requisition file, select the Posting and Sourcing tab.
2. In the Sourcing Strategy Request section, click Request Service.
3. In the Posting Requisitions page, select an agency.
4. Click Done.

The agency will receive a request to find relevant media.

## Emailing Candidates Matched to a Requisition

A user type permission grants users access to this feature.

1. In the requisition file, select the Posting and Sourcing tab.
2. In the Careers Section, select Preview Matching Candidate.
3. In the Postings Requisitions- Filter Matching candidates window, select candidates to email to.
4. Click Done.

An email is sent to selected candidates to invite them to apply on a job.

## Candidate Information Import from USAJOBS

Candidates coming from USAJOBS (the official job site of the U.S. federal government) can automatically log into a Career Section and automatically import their USAJOBS profile into a job submission.

Below is the basic flow of activities taking place when applying through USAJOBS.

### Posting a requisition on USAJOBS

Requisitions can be posted on the USAJOBS Web site through eQuest (requisitions are posted on other job board in the same manner).

### Creating an account on USAJOBS

When creating an account on USAJOBS, candidates need to create their general profile by providing general information such as their name, telephone number, email address. They also need to create a resume by providing their work experience, education, references. Candidates can create multiple resumes but they can only use one of them when they apply for a job.

### Applying on a job on USAJOBS

Candidates log into the USAJOBS Web site, search for the job for which they want to apply, select a resume they created on the USAJOBS Web site and click the "Apply online!" button. Candidates are then redirected to a Career Section to complete the application process.

**Note:** The Career Section to which candidates are redirected when they apply on the USAJOBS Web site must have the "Display the OpenID" option set to Yes (Configuration > [Career Section] Administration > Career Sections > click a career section > Sign In). Otherwise, an Access Denied error message will be displayed to candidates coming from USAJOBS.

The first time candidates access the Career Section, a sign-in page is displayed on which they are asked if they have an account. Three possible options are available:

- Option 1: If candidates have an account because they applied on the Career Section before, they can log in with their career section credentials and choose to import their USAJOBS profile information. When the candidates log in, their USAJOBS ID is linked to their existing Career Section candidate ID.
- Option 2: If candidates have an account because they applied on the Career Section before, they can log in with their career section credentials and choose not to import their USAJOBS profile information. When candidates log in, their USAJOBS ID is linked to their existing Career Section candidate ID.

- Option 3: If candidates do not have an account because they never applied on the Career Section, they are asked to create one. When candidates do that, their USAJOBS profile is automatically imported and the new account is linked to their USAJOBS ID.

**Note:** If the email address in the USAJOBS account is identical to an email address stored in the Career Section, a message is displayed informing candidates that their email address is already linked to a candidate profile. Candidates are invited to enter the user name and password of the career section account (to link the two accounts together) and to apply using the existing candidate profile.

### Creating a new career section account

If candidates select option 3, they have to specify a user name and a password to log into the career section. From there, the standard candidate creation process takes place.

### Importing candidate information from USAJOBS

Candidates' information is imported from USAJOBS. As a result, some fields in the application flow are filled automatically with information coming from the candidate USAJOBS general profile and resume. Resume information entered manually on USAJOBS is imported, not information contained in a file attachment. Also, imported information that is not part of the application flow is saved in the candidate file but the candidate will be unable to see it.

This table shows career section fields whose content may be imported from USAJOBS.

Personal Information	Work Experience	References	Education
Address (Line 1)	Current Job	Email Address	City
Address (Line 2)	End Date	First Name	Education Level (Achieved)
Cellular Number	Other Employer	Last Name	GPA
City	Other Function	Middle Name	GPA out of
Email Address	Start Date	Organization	Graduation Date
Fax Number		Phone Number	Other Institution
First Name		Title	Other Program
Home Phone Number		Type	
Job Type			
Last Name			
Middle Name			
Place of Residence			
Preferred Location			
Shift Availability Grid			
Work Phone Number			

Personal Information	Work Experience	References	Education
Zip/Postal Code			

Files attached to a candidate general profile in USAJOBS cannot be imported into a career section.

The Reference Name in a USAJOBS resume is imported into the Reference First Name field because USAJOBS does not use two separate fields as Oracle does.

#### Returning to USAJOBS

Once candidates have completed their job application, the Thank You page is displayed. Candidates can click a link on the page to return to the USAJOBS Web site. Customers might consider adding additional links back to the USAJOBS Web site on other career section pages (such as the My Submissions page). Candidates can monitor the status of their submissions by accessing the USAJOBS Application Status page. As candidates move through the various steps and statuses of the candidate selection workflow, status update notifications are sent to USAJOBS and the Application Status page displays up-to-date information.

By default (unless configured otherwise through the application status updates feature), the USAJOBS application status will be:

- Application Received: Set if candidates click the "Return to USAJOBS" link.
- Application Status not Available: Set if candidates do not click the "Return to USAJOBS" link.

#### Updating an existing application or applying on a new job on USAJOBS

Once a candidate has accessed a career section through USAJOBS either by creating a new career section account or using an existing one, the USAJOBS account and the career section account are linked together. As a result, when updating an existing application or applying on a new job through USAJOBS, the candidate is automatically logged into the career section and does not need to provide a user name or password.

If candidates modify their USAJOBS profile and resume, they can re-import them before accessing their candidate submission. Once they log into the career section, the application flow is filled automatically with information coming from the updated candidate USAJOBS general profile and resume.

## Requisition Posting Actions

### Unposting a Requisition from a Career Section

A user type permission grants users access to this feature.

The requisition must be Approved.

1. In the requisition file, select the Posting and Sourcing tab.
2. In the Career Sections section, click Modify.
3. In the Posting Requisitions page, clear the checkbox next to To be posted.
4. Click Done.

The status of the requisition is Unposted. Candidates can no longer apply via this career section.

When a requisition is being unposted and it is no longer posted on at least one career section that is external and public, the option Unpost from all job boards can be used to unpost from all job boards at the same time.

## Unposting a Requisition from a Job Board

A user type permission grants users access to this feature.

1. In the requisition file, select the Posting and Sourcing tab.
2. In the Job Boards section, click Unpost.

The status of the posting for the job board is Unposted. Candidates can no longer apply via this job board.

## Unposting a Requisition from all Job Boards

A user type permission grants users access to this feature.

1. In the requisition file, select the Posting and Sourcing tab.
2. In the Job Boards, click Unpost All.

The system will send a request to the job boards to unpost the requisition.

## Unposting a Requisition from Non-Electronic Media

A user type permission grants users access to this feature.

The requisition must be posted on a career section.

The requisition must be approved.

Posting must not be overdue.

1. In the requisition file, select the Posting and Sourcing tab.
2. In the Non-Electronic Media section, click Request Service.
3. Browse mouse over the name of a non-electronic media.
4. Click the Remove icon.

## Allowing the Posting of a Requisition

A user type permission grants users access to this feature.

A requisition must have been prevented from being posted in order to allow the posting.

The Allow Posting action is available when the requisition has one of the following statuses: Draft, Rejected, To be Approved, Approved.

1. In the requisition file, select Allow Posting... in the More Actions list.
2. Enter a comment.
3. Click Done.



An event is added to the requisition History tab with the comment entered. The Prevent Posting icon is no longer displayed in the requisition file left panel as well as in the Requisitions list. The requisition that has been prevented from being posted can now be posted.

## Preventing the Posting of a Requisition

A user type permission grants users access to this feature.

The Prevent Posting action is available when the requisition has one of the following statuses: Draft, Rejected, To be Approved, Approved.

1. In the requisition file, select Prevent Posting... in the More Actions list.
2. Enter a comment.
3. Click Done.

An event is added to the requisition History tab with the comment entered. The Prevent Posting icon is displayed in the requisition file left panel as well as in the Requisitions list. The Posting and Sourcing action is no longer available. To post the requisition, users will have to use the Allow Posting action.

## Preventing an Agent from Referring Candidates

A user type permission grants users access to this feature.

1. In the requisition file, select the Posting and Sourcing tab.
2. In the Staffing Agents section, click Modify.
3. Click Unpost.
4. Click Done.

The agent is no longer invited to refer candidates for the requisition for a position available in an organization.

## Asking Someone to Do the Posting and Sourcing of a Requisition

The Request Sourcing Configuration action is available when the requisition has the Open (Approved) status.

1. Open a requisition.
2. In the More Actions list, select Request Sourcing Configuration.
3. Select a contributor.

The Contributor selector will display users according to these requirements: active user, has the permission to view requisitions, has the permission to access the requisition's staffing type, has the permission to access the Posting and Sourcing tab, is part of the requisition's user group.

4. Specify if you want to add the contributor to the list of collaborators defined for the requisition.
5. Enter comments.
6. Click Done.

# Social Job Invite - Sharing Jobs with Social Network or Email

Ability for both candidates and users to easily share jobs via their social network or by email.

The Social Job Invite feature is available in the Career Sections and in the requisition Posting and Sourcing tab.

This feature is not part of the Taleo Anywhere solution. It does not replace the RSS & Facebook feature which allows the sending of jobs by creating a search query.

## Career Section

The Social Job Invite feature replaces the Send this Job to a Friend feature in the Career Section. Candidates have the option to select one of many social job sites or email options to send the job to someone in their friend network list, or to simply post on their wall.

The Social Job Invite feature is available on the customer's Career Sections, in the following portal pages:

- Job List
- Personalized Job List
- Job Description
- Basic Search
- Advanced Search

The system will create a URL link back to the first posted external Career Section Job Description page for the requisition being shared (the Career Section selected will not necessarily be the Career Section where the candidate is, unless that is the first posted external Career Section). The job reference URL will also have the source name embedded in it. When a candidate selects the link to apply, if the source in the URL matches the source name of an active source of type Social Network that is part of the requisition source list then that will be the source that is pre-filled into the submission. If the source is not found in the requisition source list, then the system will pre-fill the source "Other" under the Social Network source type, as long as that source is part of the requisition source list. If that source is also not in the requisition source list, then no source will be pre-filled.

If the job is unposted from the Career Section used in the URL before the candidate selects the link, the standard message indicating that the job is no longer available will be displayed.

Additional sources can be added to support more details in the source tracking in Recruiting Administration. Sources must be created under the Social Network source type. The source name must equal the source name in the provided list. The source name is not case sensitive.

When candidates choose to share jobs through social networks they must be logged in, or have a valid user account to log in to the third party sites and share.

## Requisition Posting and Sourcing tab

A Share link is available in the requisition Posting and Sourcing tab. This option is only available when a job is posted to an external Career Section.

The system will create a URL link back to the first posted external Career Section Job Description page for that requisition. If the job becomes unposted from the Career Section used in the URL before candidates select the link, they will receive the standard "Job is no longer available" message.

There is no way to unpost a requisition from the Social Network sites. There is no history tracking when requisitions are posted using the Share option

When linking to a social job site, this feature will link to the social site the user is already logged onto, and not something that can be controlled in Oracle. Therefore, the user, if wanting to post to the company fan page/account, will need to log into that social site using the company credentials.

## Sharing a Requisition Posting through Social Networks

The Share link is available only if the requisition is at least posted on one external career section.

A user type permission grants users access to this feature.

1. In the requisition file, select the Posting and Sourcing tab.
2. In the Career Sections section, click the Share link.
3. Select the desired social network.
4. Select the desired options.
5. Click Share.

## Sources and Events

A source is a medium or event through which a candidate has heard about a job.

Sources may be as diverse as Internet job boards, job fairs, magazines, specialized trade publications, newspapers, professional associations, mailing lists, recruiting agencies, etc. Events are used to track down which event, banner, or campaign are attracting the most candidates to career sections. An event can be a specific advertisement in a trade magazine, a recruiting event on a university campus (job fair), or a special recruiting event at an organization.

In the Recruiting Center, sources are displayed in the requisition Posting and Sourcing tab. When users create a requisition, only the sources that have the same Organization-Location-Job Field structure as the requisition are displayed in the Sources list. Users can modify the list of sources associated to the requisition. If event tracking was enabled, users can access the list of events related to a source. Once in the Events list, users can add, modify and delete events in the requisition.

## Adding a Source in a Requisition

A user type permission grants users access to this feature.

The requisition must have one of the following statuses: Open - Approved, Open - Scheduled, Open - Posted, Open - Unposted, Open - Expired, Pending - To be Approved (if the requisition flow has the option With Assistant).

The organization, location and job field of the source and of the requisition must match or the source must not be associated to any organization, location and job field.

1. Open a requisition.
2. Click the Posting and Sourcing tab.
3. In the Modify Source List section, click Modify...
4. Click Select next to the desired source.
5. Click Done.

The selected source appears in the Sources section of the requisition.

## Removing a Source from a Requisition

A user type permission grants users access to this feature.

1. Open a requisition.
2. Click the Posting and Sourcing tab.
3. In the Modify Source List section, click Modify...
4. In the Posting Requisitions window, click the Remove icon next to a selected source.
5. Click Done.

The selected source no longer appears in the Sources section of the requisition.

## Creating an Event

A user type permission grants users access to this feature.

1. Open a requisition.
2. Click the Posting and Sourcing tab.
3. In the Sources section, for the desired source, click on the number located in the Events column.
4. In the Events window, click Create.
5. Complete the fields.
6. Click Create.
7. Click Close.

The event is now available for the source. The number located in the Events column increases by one.

## Modifying an Event

A user type permission grants users access to this feature.

1. Open a requisition.
2. Click the Posting and Sourcing tab.
3. In the Sources section, for the desired source, click on the number located in the Events column.
4. In the Events window, select the event and click Modify.
5. Make required changes.
6. Click Save.
7. Click Close.

## Deleting an Event

A user type permission grants users access to this feature.

1. Open a requisition.

2. Click the Posting and Sourcing tab.
3. In the Sources section, for the desired source, click on the number located in the Events column.
4. In the Events window, select the event and click Delete.
5. Click Close.

The event is no longer available for the source. The number located in the Events column decreases by one.



# 6 Candidate Management

## Candidate File

### Candidate File

A candidate file is a form containing candidate information such as personal information, work experience, certifications, references, EEO information, screening information.

A candidate file is organized into three sections:

- The left pane contains the *candidate card* in the top section and supporting information in the bottom section. The card can be flipped and the pane can be expanded or collapsed.
- The right pane contains supporting tools such as the *online help* and the *online clips* if these were enabled. The pane can also be expanded or collapsed.
- The center pane displays the candidate form. Information displayed will vary whether the view mode or edit mode is selected.

To navigate from one candidate file to another, users can use the navigation icons.

#### View Mode

When opening a candidate file, users are always in view mode and they can from there choose to go into edit mode. This provides a cleaner layout and eliminates the need to "close" the file (to exit out of it and reactivate other buttons on the screen) if only viewing the file. In view mode, only fields for which data is provided are displayed. If a field is empty, it does not display in view mode. The landing tab when opening a candidate file can be configured in the *My Setup* feature, which is available via the auxiliary navigation bar.

An action bar is available at the top. Users can click an action or use the More Actions menu which is a dynamic menu of additional actions.

*Tabs* containing candidate-related information are available. The main content of the candidate file is within the Job Submission/General Profile tab, which includes various sections that can be expanded or collapsed. The other tabs contain peripheral information. From the Job Submission/General Profile tab, users can click the down arrow to access a table of contents that allows quick jumping to different sections and sub-sections of the file.

#### Edit Mode

In edit mode, all fields included in the candidate form are displayed. Fields that do not contain data are displayed according to user permissions. Required fields are highlighted with a red asterisk.

From the Job Submission/General Profile tab, users can click the down arrow to access a table of contents that allows quick jumping to different sections and sub-sections of the file.

## Candidate Card

The candidate card provides quick information about the candidate.

Located on the left pane of the candidate file, the candidate card quickly provides information about the candidate. The candidate card can be "flipped" by clicking its top-right corner.

One side of the candidate card displays information on the general profile of the candidate such as:

- name
- address
- phone number
- email address
- etc.

The other side of the candidate card displays information on the candidate's job submission(s) such as:

- Candidate Selection Workflow step/status
- prescreening results
- etc.

In addition, the candidate card displays links to other submissions of interest. This gives users a quick way of knowing which of the other submissions that have been created are still under "active" consideration. By hovering over the active or inactive link, users are presented with a callout with links to navigate to the relevant submissions. On this listing, there is also a column that indicates the step/status of the candidate for that specific submission. It is therefore easy to see at a glance without having to open and read through the actual submission, if the candidate is at the interview or at the offer stage on another position.

The content of the candidate file left pane (bottom part) is also dependent on the candidate card side selected. For example, the submission date, the source type, the recruiter and hiring manager names can be displayed. A link to any existing offers is also available. Users will only be able to see information on submissions and offers that they are authorized to access.

The content of the candidate file central pane is also dependent on the candidate card side selected. Depending on which side the candidate card is, the information displayed will vary:

- If the candidate card is on the General Profile side, the General Profile tab is displayed. The general profile contains information provided by the candidate. The information can be related for example to preferred organizations, locations, job fields, education, work experience, personal information, source tracking information, etc. Candidates have at least one profile but can have more than one. For example one in English and one in French.
- If the candidate card is on the Candidate Submission side, the Candidate Submission tab is displayed. Information relating to a specific requisition is displayed in the central pane. The candidate submission contains information about the candidate specific to that requisition.



## Candidate File History

The History tab in the candidate file contains a log of all actions performed on the candidate file.

When a candidate file is modified, either by the candidate or a user, an event to track this action is generated and is displayed in the candidate file History tab. The name of the user who performed the action is displayed as well as the date and details on the event. Candidate file tracking events belong to one of the following categories:

- Agent and referrer
- Attachments
- Candidate file update
- Candidate information
- Candidate progression
- Comments
- Correspondence
- Questions and competencies
- Regulation
- Resume
- Screening services
- Offer

Comments relating to an event can be added and edited in the History tab if users have the required permissions.

The Correspondence event category allows users to view previously sent correspondence. A user type permission allows users to resend the correspondence directly from the History tab.

Users can see attachments and offer history tracking if they have the required permissions.

A permission allows Recruiting Center users to view the content of deleted attachments in the History tab. When candidates submit attachments as part of their job application, your organization can remove these attachments. Your organization may decide to not provide access to these deleted attachments which are still visible in the History tab. If you have been granted the permission, you can click the attachment link in the History tab and view the content of deleted attachments. If you do not have the permission, you can see and click the attachment link but the system will display a message indicating that you do not have the permission to view the content of the deleted attachment.

### Modifying the Date of an Event

Users can modify the date of an event and specify when an action on a candidate's file really took place, provided the feature has been activated and they have the required permissions. The use of the actual date enables reports to more accurately reflect user activity in the selection process. There might be a number of reasons why users would want to change certain dates in a candidate's file.

Example. If a candidate had an interview on September 15, but that user was only able to enter this information in the system on September 20, the event date would indicate September 20. The user could then change this date to September 15, which would be more accurate. If the date and time related to an event can be edited, they appear as a hyperlink. The event date can only be between the application creation date and the current date.

### Hiding Confidential Information

When the value of a confidential field is modified, users who do not have the permission to view confidential fields will not see any tracking event in the candidate file Tracking tab. In Recruiting, fields configured with a Confidential security level can be hidden from users who do not have the permission to view confidential fields. If the value of a confidential field is modified, users who do not have the permission to view confidential fields will not see any tracking event in the candidate file History tab regarding that change. If later on, the security level of that confidential field is changed to General or Protected, users will still be unable to see the change in the Tracking tab.

## Candidate File Tabs

The table shows the tabs available in the candidate file.

Candidate File Tab	Description
Job Submission/General Profile	Contains information on prescreening, resume, employment preferences, EEO, etc. The contents of both the job submission and general profile are configured by the system administrator. Depending on the candidate card side being viewed, this tab will be either specific Job Submission OR General Profile.
Attachments	Contains resume and other attachments provided by the candidate and attachments provided by the user. Attachments are added using the Add Attachment icon. Job specific attachments are clearly identified from other attachments, and the name of the person who attached the file is also indicated. All attachments are managed centrally from this tab and when a user uploads an attachment, the user can specify if it will also be visible to the candidate.
Tasks	Contains a list of tasks to perform regarding the candidate. Tasks are self-assigned by users to remind them to complete a future activity. This tab only appears from the Candidate Submission card side. To be displayed, the feature must be activated and users must also have been granted the permission to manage self-assigned tasks.
Offers	<p>Displayed if offer management is used. The Offers tab is displayed on a candidate submission once an offer is created. It contains offers submitted to the candidate, offers from competitors, candidate expectations and requisition offer information. The Offers tab and offer content are always job specific and visible only from the job submission view.</p> <ul style="list-style-type: none"> <li>Competitive offers and current jobs are linked to the candidate and are thus shared between submissions for this candidate. Context based permission ownership is applied based on the owners of any requisition this candidate has applied to.</li> <li>Candidate job offers and expectation offers are linked to the submission and can only be viewed by users who can view that submission.</li> </ul>
Offer Approvals	Displayed if offer management and approvals are used. The Offer Approvals tab is displayed once an offer approval request is generated. The Offer Approvals tab is visible for any user who can view offers for the candidate submission. It contains the most recent offer approval information.
Referrer	Contains both employee/candidate referral and agency referral information and actions. The Referrer tab is always visible if the user can view the candidate's general profile or job submission.
History	Contains a log of all actions performed on the candidate file. See <i>Candidate File History Tab</i> .

# Candidates List

## Candidates List

The candidates list displays candidate file information into different columns and provides tools to filter candidates and to customize the candidates list.

The candidates list is divided into three sections:

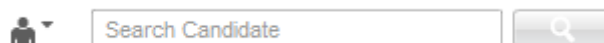
- The left pane contains three tabs:
  - The filters tab contains the *Show* filter which allows users to filter candidates using ownership values. *Quick filters* and *advanced filters* are also provided to filter the candidates list down to relevant information.
  - The *folders* tab is used to organize candidate files.
  - The *talent pool* tab is used to see talent pools and match employees and candidates to requisitions.
- The right pane contains *online help* and *online clips* if these were enabled. The pane can also be expanded or collapsed.
- The center pane displays candidates. The List Format Configuration icon allows users to select the list format they wish to use to display candidates in the list. Users can also create up to three list formats and select columns to display specific information (if permissions were granted). Several *actions* can be performed directly in the list. A contextual action menu is available by clicking the arrow next to the file title. For information on the tools available in the list, see *List Usage*.

# Candidate Search

## Candidate Quick Search

The candidate quick search allows Recruiting Center users to quickly find specific candidates.

The candidate quick search is available at the top right hand corner of the Recruiting Center pages. It is available to Recruiting Center users if settings were configured and if user type permissions were granted.



When performing a candidate quick search, the search engine searches for candidates who applied on a job, submitted a profile, or are registered but did not apply on a job (could be a person who referred a friend for a job and who had to register as a new user, or a person who registered while clicking My Account).

The candidate quick search engine searches information in the following fields of the candidate file:

- first name
- last name
- middle name
- email address
- username
- candidate identification number

When performing a candidate search, users can enter partial names (either the first or last name with the \* wildcard) or complete names in the field. However, a best practice is to enter complete names to obtain better results.

Users can also perform a search with a middle initial if they know the person's full name (example: Sam P Jones). If searching for someone who's first name contains initials, we recommend entering just the initials (example: Jr. will give you the following results: Jr., j.r., or JR).

If looking for someone who hyphenates their name, it is not required to enter both names. Let's say Smith-Jones is the name you are looking for. Entering Smith, Jones, Smith space Jones or Smith-Jones, will bring back Smith-Jones.

The candidate quick search searches for all the search terms in the above mentioned fields. It works only for users having access to all the fields. For example, if the email field is hidden for a user type, searching by name will not work. For this reason, the *specific candidate search* often produces search results that are more relevant than those generated by the candidate quick search.

## Performing a Candidate Quick Search

Settings allow the activation of this feature.

User type permissions grant users access to this feature.

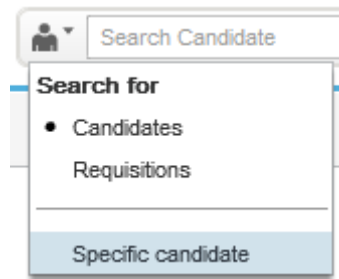
1. In the Search tool, select Candidates.
2. Enter the candidate first name, last name, identification number, user name and/or email address.
3. Click the Search button.

Users can quickly find a specific candidate file. Candidates who satisfy search criteria are displayed in the search results list.

## Specific Candidate Search

The specific candidate search can be used when too many results are returned by the candidate quick search. It is considered to be an extension of the candidate quick search in that it offers greater result precision.

The specific candidate search is available at the top right hand corner of the Recruiting Center pages. It is available to Recruiting Center users if settings were configured and if user type permissions were granted.



If Recruiting Center users have the permission to access candidate identification information, the candidate search will allow them to search by:

- candidate identification number only (you must use at least two numbers of the total identification number or more, otherwise the search will not work)
- candidate first name
- candidate last name
- candidate first and last names
- email address

Using the specific candidate search, users can enter the same or different search terms in any of the four fields. For this reason, the specific candidate search often produces search results that are more relevant than those generated by the *candidate quick search*.

Wild card can be used with one or two characters in the specific candidate search, to support searching for combined words.

For example, d\* in first name and monroe in last name will return all monroe with first name starting by d.

## Performing a Specific Candidate Search

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

1. In the Search tool, select Specific Candidate.
2. Enter information in the fields.
3. Click Search.

Users can search for candidates using the First Name, Last Name, Initial, Email Address and/or Candidate ID fields. Candidates who satisfy the search criteria are displayed in the search results list.

## Advanced Search

The Candidate Advanced Search allows Recruiting Center users to search for candidates using precise criteria in the form of keywords and structured fields.

The Candidate Advanced Search enables users to find and match relevant candidates to their open requisitions. Users can create search queries using keywords to search across numerous text fields of the candidate file and combine them with specific fields such as prescreening questions and skills that typically produce search that have a higher degree of precision.

The Candidate Advanced Search is available at the top right hand corner of the Recruiting Center pages. It is available to Recruiting Center users if settings were configured and if user type permissions were granted.



## Advanced Candidate Search Form

Because system administrators can customize the Advanced Candidate Search form, the search form might have a different layout in different zones and even for different users, based on their configuration profile.

By default, the following search criteria are included in the Advanced Candidate Search form:

- Keywords
- Last Update
- Place of Residence: recruiters can select a reference location or a company location when searching for candidates.

Users who have the required permission can add other search criteria provided they were made available by the system administrator. This is done using the Customize... button. For a list of fields available for the Candidate Advanced Search, see [Advanced Search Fields](#).

For many search fields, users can specify an additional criterion:

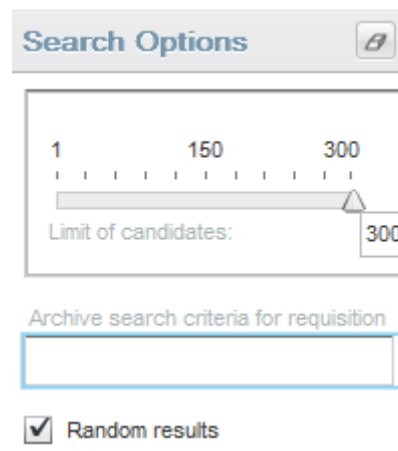
- Required: Only candidates with that criterion are retrieved.
- Excluded: Candidates with that criterion are excluded.
- Desired: Candidates with that criterion are considered more relevant than those without the criterion.

Users may also search on precise Organization-Location-Job Field (OLF) elements without incorporating candidates with parent preferences or null values in preferences. When this feature is enabled, if a user is performing a Candidate Advanced Search using Place of Residence as a Required criteria or Organization-Location-Job Field as a Required criteria, search results will display only candidates with an exact match at the same level. No parent or empty value will be returned. For example, searching for San Francisco will no longer return candidates within California, United States or that have an empty preference value.

When users perform a candidate advanced search and enter a value in the Institution, Program, Employer, Job Function or Certification field, the system looks for candidates who have the same value either in the corresponding field or in the corresponding "Others" field.

For example, if a recruiter performs an advanced search and enters "Oracle\*" in the Employer field, the system will return candidates who have an Employer field with text starting with "Oracle" or an "Other Employer" field with text starting with "Oracle".

Two search options are available on the left side of the Advanced Candidate Search page: "Archive search criteria for requisition" and "Random results". These options support OFCCP requirements and are usually activated only for customers located in the United States through protected settings. The Archive search criteria for requisition field, once activated, can be optional or mandatory. Once a requisition is entered in this field, the search query and search results are kept in a log file and the retrieved candidates cannot be hard deleted from the database for the next two years. The Random results option generates a different set of candidates who match the required fields every time you run the same search if the total number of candidates matching your criteria is above the number of displayed candidates, usually set to 300. For details, see [Search Results Archiving](#) and [Randomized Search Results](#).



When performing a Candidate Advanced Search, the more you add search criteria, the narrower the scope of your search will be, typically resulting in fewer but more pertinent results. By adding multiple occurrences of the same criteria, you broaden the scope of your search, typically resulting in more search results.

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

The search engine can retrieve any number of candidate files although, for performance and management reasons, only 300 are displayed. By default, we suggest to display the top 300 by relevancy.

## Candidate Advanced Search Fields

The table presents fields available in the Advanced Candidate Search page.

To be available to Recruiting Center users, these fields must first be made available by system administrators. Then, users who have the required permission can add these fields in the Advanced Candidate Search page using the Customize... button.

Fields available in the Advanced Candidate Search page:

- All user-defined fields (UDF) marked as "Candidate Search" at the field property level.
- Personal information:

- Accepts Job Posting Notifications
- Date of Birth
- Email Address (or User Name)
- Employee Number
- First Name
- Last Name
- Middle Name
- Prefix
- Referred/Not Referred
- Social Security Number
- Work Phone Number
- Basic profile from the profile:
  - Advance Notice
  - Date of Availability is
  - Employee Status
  - Job Level
  - Job Shift
  - Job Type
  - Schedule
  - Travel
  - Preferred Job
  - Preferred Location
  - Preferred Organization
  - Shift Availability Grid
  - Willing to work on holidays
  - Willing to work on weekends
  - Expected Hourly Pay Rate
  - Hours per week willing to work
  - Hours per week, preferred
- Education from the profile:
  - Institution
  - Other Institution
  - Program
  - Other Program
  - Education level (Achieved)



- Graduation date
- Start Date
- GPA (normalized value)
- Graduated
- Any searchable education user-defined field
- Experience from the profile:
  - Current Job
  - Employer
  - Other Employer
  - Job Function
  - Other Function
  - Any searchable experience user-defined field
- Questionnaires:
  - Questions from library (no local questions from requisition)
  - Skills
- Sources and mediums from all submissions:
  - Application Medium
  - Event ID
  - Source Name
  - Source Type
- Certification:
  - Certification
  - Other Certification
  - Location
  - Certification ID
  - Issuing Organization
  - Issue Date is between
  - Expiration Date is between

## Example of a Candidate Advanced Search

This example shows search criteria used to perform an advanced search and the results of such a search.

Search criteria:

- Exclude Disqualified Candidate: Yes

- Place of Residence (Required):
  - Within 25 miles of location
  - US > FL > Jacksonville
- Preferred Job (Required):
  - Category: Technology
  - Function: Network Engineering
- Preferred Job (Required):
  - Category: Technology
  - Function: System Administration
- Education:
  - Program: Computer Engineering
  - Education Level: Bachelor's Degree
- 

After running the above search, the search engine would return the following candidates:

- Candidates who had not been disqualified, AND
- Candidates who lived within 25 miles of Jacksonville, Florida, AND
- Candidates who had indicated a preference for work in network engineering or system administration, AND
- Candidates without any job field, AND
- Candidates who had a Bachelor's degree in computer engineering.

## Performing an Advanced Search

A user type permission grants users access to this feature.

1. In the top right-hand corner, click Advanced Search.
2. Enter or select information in the displayed fields.
3. Click Customize... if you want to use other search fields.
4. Click Search.

Candidates who satisfy the search criteria are displayed in the search results list.

## Setting Default Search Criteria

A user type permission grants users access to this feature.

1. Click Resources, then My Setup located in the top right-hand corner.
2. In the Preferences tab, click Edit.
3. Select a value in the Last Update field.
4. Select a value in the Place of Residence field then click the Selector icon to select a location.

5. Click Save.

The value selected for the Last Update and Place of Residence search criteria will be used in all types of candidate search.

## Advanced Search with Keywords

Keywords can be used when performing a Candidate Advanced Search.

In earlier releases, when users used the candidate advanced search's Keywords field, the system searched a large number of Candidate Profile fields as well as the five most recently attached files (three attached by candidates and two attached by users). Now, system administrators can configure a setting that will determine the fields that will be searched when using the Keywords field in the Advanced Candidate Search form. The setting can be set to Optimal (default value) or Legacy. The Legacy value should only be chosen to revert to original list of profile fields used prior to 13C – primarily to include "comments" in keyword search.

The table shows the fields searched by the candidate advanced search's Keywords field whether the setting is set to Optimal or Legacy.

Fields searched when the setting is set to Optimal	Fields searched when the setting is set to Legacy
Personal information fields: <ul style="list-style-type: none"> <li>• first name</li> <li>• last name</li> <li>• middle initial</li> <li>• employee number</li> <li>• street address</li> <li>• city</li> <li>• phone numbers</li> <li>• email address</li> <li>• postal code</li> </ul>	Personal information fields: <ul style="list-style-type: none"> <li>• first name</li> <li>• last name</li> <li>• middle initial</li> <li>• employee number</li> <li>• street address</li> <li>• city</li> <li>• phone numbers</li> <li>• email address</li> <li>• postal code</li> </ul>
Text-based user-defined field answers.	Text-based user-defined field answers.
Pasted cover letter from the general profile.	Pasted cover letter from the general profile.
Pasted resume from the general profile.	Pasted resume from the general profile.
Career objectives from the general profile.	Career objectives from the general profile.
Additional information from the general profile.	Additional information from the general profile.

Fields searched when the setting is set to Optimal	Fields searched when the setting is set to Legacy
<p>All file attachments from the candidate provided the attachments have one of the following supported file formats:</p> <ul style="list-style-type: none"> <li>.doc, .docx (Word)</li> <li>.txt (standard text file)</li> <li>.rtf (rich text format)</li> <li>.pdf (Adobe Portable Document Format)</li> <li>.htm or .html (hypertext markup language documents)</li> <li>.wpd (Word Perfect)</li> <li>.odt (if Oracle 11G is used)</li> </ul>	<p>The three most recent file attachments per candidate:</p> <ul style="list-style-type: none"> <li>.doc, .docx (Word)</li> <li>.txt (standard text file)</li> <li>.rtf (rich text format)</li> <li>.pdf (Adobe Portable Document Format)</li> <li>.htm or .html (hypertext markup language documents)</li> <li>.wpd (Word Perfect)</li> <li>.odt (if Oracle 11G is used)</li> </ul>
<p>The two most recent file attachments from users (displayed in the Attachments tab), limited to supported file format type.</p>	<p>The two most recent file attachments from users (displayed in the Attachments tab), limited to supported file format type.</p>
<p>Education [Institution, Program, Other institution, Other Program and text-based user defined fields] from the general profile.</p>	<p>Education (Other institution, Other Program and text-based user defined fields) from the general profile.</p>
<p>Work Experience (Employer, Job Function, Other Employer, Other Job Function, Achievements, and text-based user defined fields) from the general profile.</p>	<p>Work Experience (Other Employer, Other Job Function, Achievements, and text-based user defined fields) from the general profile.</p>
<p>Text-based answers to questions from the library.</p>	<p>Text-based answers to questions from the library.</p>
	<p>Comments (from the History tab).</p>
	<p>Source and event names.</p>
	<p>User name.</p>

System administrators can also specify the types of attachments searched by the candidate advanced search's Keywords field:

- all attachments
- candidates visible attachments
- attachments tagged as resumes

### Keywords and Boolean Operators

Keyword search is considered to provide exact matches. However, if a user includes OR in a search query, the search engine looks of course for exact matches for one word or the other. Boolean operators are pretty straightforward but when a complex search query using multiple Boolean operators is incorrectly formulated, results are unpredictable. The Keywords search supports the following boolean operators:

Boolean Operator	Description
AND	By default, words entered in the Keywords field are linked (transparently) by the AND operator. If you searched for "product manager" (without the double quotation marks) or for "product and manager" (without the double quotation marks), the search results would be the same. The search engine would retrieve all candidates whose file contains both words (the words will not necessarily be next to each other).
OR	You can use the OR operator to change the default behavior (AND) or to build more complex queries. For example, if you searched for "competitor1 OR competitor2 OR competitor3" (without the double quotation marks), the system will retrieve candidates whose file contains at least one of the competitors' names.
NOT	You can use the NOT operator to exclude specific keywords from a query. For example, if you wanted to exclude from the search results candidates whose file contained the name of a specific company, but did refer to a specific competitor, you could search for "competitor1 NOT company1" (without the double quotation marks).
Parentheses	<p>Operations enclosed in parentheses are performed before other operations. For example, a search query for candidates who worked as marketing or advertising consultants could look like the following: (market* or advertis*) and (consult* or agent or representative). The search engine would retrieve candidate files that satisfy the two conditions:</p> <ul style="list-style-type: none"> <li>• Candidate files containing a word that begins with market or advertis such as market, markets, marketing, advertise, advertising, advertisement AND,</li> <li>• Candidate files containing agent, representative, or a word beginning with consult such as agent, representative, consult, consults, consulting, consulted, consultant.</li> </ul>
Wild Card	<p>The wild card "*" (asterisk) can be placed at the end of a word. For example, a search for comput* will retrieve all words that begin with comput such as computer, computing, computers, computation.</p> <p>Wild cards within double quotation marks are not supported.</p> <p><b>Note:</b> An update to the Lucene search server engine slightly modified the behavior when using the wild card * in the quick search, specific search, and advanced search. If the number of words returned by the query reaches 5000, no warning message will be displayed asking you to refine the search. Be aware that it might take a while for the search engine to return any result when the query is too generic. Also note that when performing a quick search using the wild card * at the beginning of a word, such request is heavier on the search server and you might have a longer response time.</p>
Double quotation marks around strings	<p>You can use double quotation marks to search for a specific string. For example, if you wanted to find product managers but not product specialists who are also assistant managers, you could type "product manager" (<i>with</i> the double quotation marks).</p> <p><b>Note:</b> You need to <i>type</i> the double quotes in the Keywords field; do not copy them from other applications such as Word and paste them into the field. Also note that double quotes can vary from one keyboard language to another. If you use a French keyboard and use these «quotes», the search engine does not recognize them as double quotes in the Keywords field.</p>

## Keywords and Stop Words

Stop words are indexed in the Keywords field when doing an advanced candidate search. Stop words are small words not included in the index and excluded from a search because they are not considered to be significant. For example, words such as "no, not, the, one, and, or" and all single letters are stop words.

Stop words are considered by the system when placed within quotation marks or parenthesis. For example, when users are searching for "The Store" placed within quotation marks or parenthesis, the system will consider the stop word "the". When users are searching for The Store without quotation marks nor parenthesis, the system will ignore the stop word in the query.

## Keywords and Special Characters

In general, special characters used as punctuation or separators are not included in the search index and cannot be used to retrieve information. This is the case for the following characters:

- :
- ;
- .
- ,
- "
- '
- -
- \_
- &
- \*

**Note:** Exception: When used in email and phone number fields, some special characters are supported. For example, john.smith@taleo.net is supported as is, because the system recognizes this is an email address.

## Keywords and Exact Term

When you perform a Keywords search with Exact Term selected, words that match exactly the terms you entered are returned and highlighted. You can use the wild card \*, quotation marks, parentheses, and Boolean operators (AND, OR, NOT) to construct sophisticated candidate search queries. The system applies the AND operator between words.

## Keywords and Related Terms

The OR operator is applied transparently when the Related Term option is selected. The search engine searches for occurrences of the word you entered but also searches for occurrences of related terms determined by the system. Such related terms might be particularly relevant to your search while other related terms might be less pertinent.

You should use the Related Terms feature when your initial query did not retrieve a lot of candidates. The Related Term feature enables you to retrieve candidates whose file contains a word that is similar in meaning to your search word in addition to candidates whose file contains your exact search word. In addition to retrieving similar words, it retrieves words with the same first 6 letters, since those words are most likely in the same family. For example, if you search for "Administration" using related terms, the engine will also search for "administrative", "administrator", etc.

## Keywords and Conceptual Search

The conceptual option for the advanced search is available if your system administrator has activated the proper setting.

The conceptual search is an extension of the related term search, where instead of finding variations of entered words, the system automatically finds the right concepts to search for based on the text provided and then broaden its search. The conceptual search allows you to use large blocks of text (typically from a candidate's resume or a job description) to search for candidates. Conceptual search is typically the best tool to use when searching for candidates with attached files. This tool can be used when you are viewing a relatively large amount of text regarding particular sections of a candidate's resume such as experience and education, or a job description and you want to know if there are other candidates whose records contain similar information. For details, see [Conceptual Search](#).

### Keywords and Highlighting

Keyword highlighting is activated by your system administrator and is limited to Advanced Search results. Each occurrence of the keyword is highlighted in yellow on all tabs in the candidate file and in the attached files. Up to fifty different terms can be highlighted. A private setting is used to limit the number of highlighted words (contact Oracle Support for details). The search will highlight words together when the search keyword includes double quotes, to better match what is really retrieved by the search engine. For example, searching for "product manager" displays only candidates with "product manager" in their file. Words are highlighted throughout the entire candidate file, even the labels, so some of the highlighted words are not used to retrieve the candidates.

**Note:** When performing a candidate advanced search with the Keywords field, an entire word or 3 characters with a wild card (\*) can be used as a keyword.

## Candidate Advanced Search and Structured Fields

If your company is using specific fields to capture experience or competencies, using the corresponding fields will generally produce better results than using the Keyword search.

For example, an advanced search that included java skills in the competencies section of the search page and specifying both a minimum proficiency and experience level would retrieve candidates who met those criteria. A Keyword search for "java", on the other hand, might include candidates who liked this type of coffee in addition to candidates who had experience with the java programming language.

There is an important "logical" grouping function that applies only to structured data.

For example, if you wanted to search for candidates who had obtained a Master's degree in business administration from Harvard University, this would be possible using the Education block. If you used the Keyword search, however, to search for "Harvard university masters business administration", the search results might include candidates who were studying in sociology at any university but living in Harvard, Illinois and considered themselves "masters" in business administration!

In conclusion, the use of structured fields can significantly reduce the number of irrelevant search results.

## Advanced Search and Multiple Occurrences of Information Blocks

When performing a Candidate Advanced Search, it is possible to use multiple occurrences of the Education and Work Experience blocks.

When using multiple blocks, the OR operator is used.

If you use multiple occurrences of blocks, care should be taken in choosing fields and in making selections from the Required, Desired and Excluded options.

The following examples demonstrate how multiple Education blocks can be used to perform highly precise searches. The same principles apply to multiple Work Experience blocks.

Example 1: In this example, the search results would contain either candidates with a Bachelor's degree in computer information systems and a GPA between 3 and 4, or candidates with a college diploma in computer information systems and a GPA between 3.5 and 4. Both Education blocks are Required.

Education Block 1 - Search Field	Education Block 1 - Search Value
Education Block 1	Required
Program	Computer Information System
Education Level Achieved	Bachelor's Degree
GPA is at least	3 out of 4

Education Block 2 - Search Field	Education Block 2 - Search Value
Education Block 2	Required
Program	Computer Information System
Education Level Achieved	Associate's Degree/College Diploma
GPA is at least	3.5 out of 4

Example 2: In this example, the search results would contain only candidates with a Bachelor's degree in computer information systems and a GPA between 3 and 4. Candidates who studied at McGill University—regardless of the program, education level, and GPA—would appear higher on the results list than those who had never attended the school. The first Education block is Required and the second one is Desired.

Education Block 1 - Search Field	Education Block 1 - Search Value
Education Block 1	Required
Program	Computer Information System
Education Level Achieved	Bachelor's Degree
GPA is at least	3 out of 4

Education Block 2 - Search Field	Education Block 2 - Search Value
Education Block 2	Desired



Education Block 2 - Search Field	Education Block 2 - Search Value
Institution	McGill University
GPA is at least	3.5 out of 4

Example 3: In this example, the search results would contain only candidates with a Bachelor's degree in computer information systems and a GPA between 3 and 4 provided they never attend McGill University. The following candidates (among others) could conceivably appear in the search results:

Education Block 1 - Search Field	Education Block 1 - Search Value
Education Block 1	Required
Program	Computer Information System
Education Level Achieved	Bachelor's Degree
GPA is at least	3 out of 4

Education Block 2 - Search Field	Education Block 2 - Search Value
Education Block 2	Excluded
Institution	McGill University
Program	Computer Information System
Education Level Achieved	Bachelor's Degree
GPA is at least	3 out of 4

- Candidates with a Bachelor's degree in computer information systems and a GPA between 3 and 4 at Brown University.
- Candidates with a Bachelor's degree in computer information systems and a GPA between 3 and 4 at Brown University and with a Master's degree in computer information systems at McGill University.
- Candidates with a Bachelor's degree in computer information systems and a GPA between 3 and 4 at Brown University and with a second Bachelor's degree in computer information systems at McGill University and a GPA of only 2.

The first Education block is Required and the second one is Excluded.

## Candidate Advanced Search Using Locations

When performing an advanced search, Recruiting Center users can select a reference location or a location defined by their organization when searching for candidates.

For searches using locations, the accuracy of the results will depend on the accuracy of the information provided by your organization when defining the locations. To obtain more granular radius searches (for example, within 5 miles or

10 miles), your organization should have work locations defined with address level information to improve the accuracy of the search results.

## Candidates Retrieved by the Advanced Search

Candidates retrieved by the advanced search may differ depending on different scenarios.

For most clients, the default maximum number of retrieved candidates is set to 300. Some clients are using a smaller set, usually because they consider those candidates are typically qualified for a specific position. Regardless of the number of candidates matching the search criteria, if the query does find more than the maximum number, which candidates are actually displayed in the advanced search results?

There are three scenarios:

- If any relevancy is calculated, based on keywords and Desired criteria, then the most relevant candidates are displayed and then sorted.
- Search with randomization will also return a list of 300 candidates or less, but instead of displaying the first 300 candidates, it will display any of 300 matching candidates, with no predetermined priority, and will sort them based on the sorting criteria set for the list. Any candidate matching the search criteria can be returned. Two subsequent searches using the exact same criteria typically retrieve two different result sets when randomization is used.
- If no relevancy is associated with candidates, for example if only Required and Excluded criteria are used, then the list of displayed candidates is not random and is based on an internal key. When a user executes two searches in a row without using the randomized option, the system will retrieve the same set of candidates. But if the user executes two searches in a row with the randomized option, the system will return two different sets of candidates. Of course, this is true if the number of matching candidates is higher than the list size maximum, usually 300, and if the conditions are the same, thus no change in the criteria list and no new matching candidates.

## Randomized Search Result

The randomized search result feature allows Recruiting Center users to specify that the information contained in the advanced search result list be returned in random order.

The randomized search results feature supports requirements from the Office of Federal Contract Compliance Programs (OFCCP) and is usually activated only for customers located in the United States through protected settings. Randomized search means that candidates displayed in the advanced search result list are picked randomly in the overall list of candidates matching search criteria. An advanced candidate search done with randomization will return a list of 300 candidates or less, but instead of displaying the first 300 candidates, it will display any 300 of the matching candidates, with no predetermined priority, and will sort them based according to the sorting criterion set for the list. Any candidate matching the search criteria can be returned.

In the Recruiting Center, the Random results option is disabled when users perform a Conceptual Search. In previous releases, when the Random results option was selected in the Advanced Candidate Search page and the number of matches was higher than the limit of returned results, the system returned a random set of results from the matching set (and the resulting set was sorted by relevancy). This is not an issue when search criteria are specific and the result

set is small. However, when performing a Conceptual Search or a very broad search (using related terms, for example), the result set might be quite large and the Random results option might provide poor quality results:

- When performing a conceptual search, the Random results option is turned off.
- When using the "find candidates matching a job requisition" feature (available in the requisition file toolbar) or the "find similar candidates" feature (available in the candidate file toolbar), the Random results option is turned off.

**Note:** The Random results option continues to be available for both the Exact term and Related Terms keyword search. For customers who have the Search Randomize Enabled setting set to Yes, the Random results option will be selected by default for both the Exact term and Related Terms keyword search. In these types of search, if the number of matches is higher than the limit of returned results, the system will return a random set of results from the matching set. Conceptual Search analyzes a relatively large amount of text when performing a broad match against the candidate database. As such, this type of search is used to discover hard-to-find candidates and is not a tool to exclude candidates. The search results from a Conceptual Search only make sense when they are ranked in order of relevancy and as such is incompatible with the Random results option.

## Randomizing Search Results

This feature supports OFCCP requirements and is usually activated only for clients located in the United States through protected settings.

1. In the top right-hand corner, click Advanced Search.
2. In the Search Option panel located on the left-hand side, select the Random results option.
3. Select a requisition.
4. Enter information in the displayed fields.
5. Click Customize... if you want to use other search fields.
6. Click Search.

## Search Result Archiving

The search result archiving feature allows Recruiting Center users to select the requisition for which they want to archive search criteria and results.

The search result archiving feature supports requirements from the Office of Federal Contract Compliance Programs (OFCCP) and is usually activated only for customers located in the United States through protected settings. When performing an advanced search, search criteria and/or results are archived in the database. The information is kept in the database for two years for audit purposes and prevents candidates from hard deletion.

When the feature is activated, all search results, even those done for requisitions outside the US will be archived.

## Archiving Search Results

This feature supports OFCCP requirements and is usually activated only for clients located in the United States through protected settings.

1. In the top right-hand corner, click Advanced Search.

2. In the Search Option panel located on the left-hand side, click the Selector icon next to Archive search criteria for requisition.  
Once a requisition is entered in this field, the search query and search results are kept in a log file and the retrieved candidates cannot be hard deleted from the database for the next two years.
3. Select a requisition.
4. Enter information in the displayed fields.
5. Click Customize... if you want to use other search fields.
6. Click Search.

## Why Advanced Search is not Displaying Expected Results

Certain elements could have an impact on advanced search results.

**Data segmentation:** If your organization has activated data segmentation, this might exclude a lot of candidates from your search results. For this reason, it is important to verify if your organization has implemented such restrictions and, if this is the case, ask how they affect which candidates you are entitled to view. There are two dimensions to data segmentation: a user type permission whereby the candidates displayed to a user are determined by the person's staffing type; and the Organization, Location and Job Field (OLF) associated with groups that the user is a member of. While it might be easy to manage only a few groups around specific organizations, the effect of segmentation can be difficult to clearly understand if users are associated with multiple groups incorporating various OLF. Ask your system administrator if the *Activate Segmentation in Search* setting was activated.

**Incomplete submissions:** Many candidates never complete their submissions for various reasons. An incomplete general profile will not be retrieved during a search if your organization has configured the system that way. In average, 33% of candidates might not have completed a job specific submission or a general profile. An interesting alternative to not displaying such candidates is to display them and add an Incomplete Submission column.

Remember that the "incomplete submission" flag refers to the online submission process, not to the completeness of the candidate file overall. If your organization does not display incomplete submissions, incomplete submissions that might contain a lot of information are obviously not displayed. On the other hand, you might have partial submissions, that were captured or imported, and those partial submissions have the "complete" flag, even if only few fields were captured. Thus, incomplete submission refers to online submissions or online profiles that have not passed the submission page, regardless of whether all the content has been provided or not. Ask your system administrator if the *Display Incomplete Application Protected* setting was activated.

**Identification missing:** "Identification missing" candidate files are missing a candidate's first and last name and do not have the official "anonymous" flag. Ask your system administrator if the *Display Identification Missing Candidates* setting was activated.

**Excluding candidates in selection process:** Candidates who are in a selection process associated with an open requisition can be excluded from search results. Ask your system administrator if the *Candidate Search Mask Processed* setting was activated.

**Excluding candidates in selection process who have attained or proceeded beyond a specific status:** The *Threshold CSW Step - Hide from Search* setting indicates the CSW reference model step at which, once reached, candidates will be excluded from search results (unless the user type has overriding permission). Candidates are excluded from search results once they have reached the threshold step or when they are at a step that comes after the threshold step in the reference model sequence. Ask your system administrator if that setting and user permission were activated.

**Matching the place of residence:** By default, when a user searches for candidates associated with a specific place of residence, the system retrieves candidates associated with a "higher" location in addition to the specific location (place

of residence). It is recommended that you include "higher" levels (country and state/province) because even if in theory candidates do have all levels (down to region), some might not. Exceptions are:

- If the place of residence field is not mandatory (usually only optional in capture candidate or through import).
- If it is a new country. Place of residence locations, which are centrally managed, increase in number as customers request that specific new countries be included. Oracle had numerous countries without states or regions in the past and started to add into the database such countries' regions on a customer-by-customer basis. Some candidates never had the opportunity to select a 2nd or 3rd level so it is important that they are not excluded by default when a search is performed.

The number of exceptions should be less than the number of candidates with an exact match and Oracle feels it is fair to retrieve those candidates who never had the opportunity to indicate their structured place of residence. Some Oracle customers might want to change this setting however.

## Conceptual Search

Conceptual Search is an alternative way to search candidate files that broadens the search result by including documents that are similar based on concepts and proximities. The retrieved documents do not need to contain everything entered as search criteria, only related concepts.

In a Conceptual Search, most of the structured data elements are not part of the candidate file and are leveraged by the Advanced Search engine. Although Conceptual Search might be the preferred search method of some users, the Conceptual Search engine was built to complement the Advanced Search. Advanced Search can retrieve candidate files with more precision, using mandatory criteria used to source candidates for a specific requisition and can clearly define the required criteria set for a specific job. But what if you don't have precise criteria for a search? What if you have candidates without structured data and who have simply a pasted resume or an attached file? Or perhaps you cannot find any candidates using the Advanced Search and want to know what your database holds with regard to a hard-to-fill job description or candidates used as a basis to find other candidates. These are scenarios for which the Conceptual Search is most suitable.

Once the Conceptual Search module is enabled, the system administrator can control which users will have access to Conceptual Search by granting them a user type permission.

The Conceptual Search is available via the Advanced Search. When selecting the Conceptual option, users must enter significant text in the Keywords field (typically taken from a candidate's resume or a job description) to search for candidates. The search engine then looks through the following content of the candidate file:

Content Searched by the Conceptual Search
Pasted resume from the general profile.
Career objectives from the general profile.
Additional information from the general profile.
Education (Other Institution, Other Program, Education Level (Achieved), and text-based User Defined Fields) from the general profile.
Work Experience (Other Employer, Other Job Function, Achievements, and text-based User Defined Fields) from the general profile.

**Content Searched by the Conceptual Search**

Text-based answers to questions from the library.

Text-based user-defined field answers.

The last three attachments per candidate provided the attachments use one of the following supported file formats:

- .doc, .docx (Word)
- .txt (standard text file)
- .rtf (rich text format)
- .pdf (Adobe Portable Document Format)
- .htm or .html (hypertext markup language documents)
- .wpd (Word Perfect)
- .odt (if Oracle 11G is used)

On top of that, users can increase the Conceptual Search with any specific search criteria made available to them. This provides the possibility to mine the database on various concepts to find interesting candidates, but also restricts the result with more precise criteria, which was not available before.

The conceptual search cannot retrieve disqualified candidates because they are not indexed in the database.

Below are a few tips when using Conceptual Search.

**Tip 1: Provide enough text in the Keywords field**

If you only need to type a few words, it is usually advisable to perform a Keyword search or Related Terms search instead of a Conceptual Search. The Conceptual Search analyzes a text, extracts the most significant elements and compares them with significant words and relationships between words extracted from a sample of about 100,000 candidate files from your database. The system discards non-significant words from its reference list in the knowledge base. A word used by only a few candidates or another used by almost all candidates might not have any weight in the Conceptual Search "brain".

For example, if you searched for the word "consultant" in a consultant database, then the word would occur so many times that it might not even share any concept with other words. The search engine would perform a search using the exact word "consultant" and most or all of the candidates would have this criterion.

If you performed a Conceptual Search using only a few words, chances are that some of the words would be non-significant. You would better off pasting entire paragraphs and let the system determine what is important in each one and identify the best candidates based on this information.

**Tip 2: Sort results by decreasing relevancy**

The Conceptual Search engine tends to retrieve a lot of candidates. What distinguishes them is the relevancy between the candidate file and the Conceptual text box. You will typically want to sort the retrieved candidates from most relevant to least relevant.

## Performing a Conceptual Search

A user type permission grants users access to this feature.

1. In the top right-hand corner, click Advanced Search.
2. Enter text in the Keywords field.  
You can enter large blocks of text (typically from a candidate's resume or a job description) to search for candidates.
3. Select the Conceptual option.
4. Enter information in the displayed fields.
5. Click Customize... if you want to use other search fields.
6. Click Search.

Candidates who satisfy the search criteria are displayed in the search results list.

## Candidate Search Based on a Requisition

Recruiting Center users can create a search query based on a requisition.

This feature is available in the requisition file, using the Create Search Query icon. Clicking this icon creates an advanced candidate search query automatically. The default location and last update originate from the user preferences (available in the My Setup feature). In addition to the last update and place of residence default configuration, the search query will default to:

- Requisition in the archiving field, if activated.
- Keyword: will be filled by the job title. Default is Exact Term.
- Last update: user preference from My Setup or default value.
- Place of residence: user preference from My Setup or Network location based on the mapping of the primary location, as done in the foundation data by the system administrator. Default is Required.
- Preferred location: all locations are included; primary and additional ones. Default is Required.
- Preferred job. Default is Required.
- Employee Status: a Desired value affecting relevancy.
- Schedule: a Desired value affecting relevancy.
- Job Shift: a Desired value affecting relevancy.
- Job Type: a Desired value affecting relevancy.
- Travel (Willing to travel up to...): a Desired value affecting relevancy.
- Competencies: Desired values affecting relevancy and based on minimal criteria definition.
- Questions if from the library. Requisition-specific questions cannot be searched for.

Once the user executes the candidate search based on the requisition, the user has the option of matching any or all of the retrieved candidates to the requisition. To do this, the user selects the appropriate candidates in the results list and click the Add Candidates to Requisition icon. Because the criteria of the advanced search performed were based on a

requisition, that requisition is typically displayed (along with others perhaps) in the Requisition Selector window. Make your selections and click Done to match the candidates you selected with the requisitions you selected.

## Searching for Candidates Based on a Requisition

A user type permission grants users access to this feature.

1. Open a requisition.
2. Click the Create Search Query icon.
3. Enter information in the displayed fields.
4. Click Customize... if you want to use other search fields.
5. Click Search.

Candidates who satisfy the search criteria are displayed in the search results list.

## Similar Candidate Search

Recruiting Center users can look for similar candidates based on information of an existing candidate.

This type of search (often referred to as "more like this" search) can be performed from a candidate list or from within a candidate file by using the Find Similar Candidates icon.

The "find similar candidates" search uses the candidate file, which includes the fields used in the *Conceptual Search*, as the search criteria.

In addition to this information, the system uses default values for the Last Update and all the underlying search parameters applied in the Conceptual Search. The candidate's location is ignored because the system cannot assume you want to search for the current candidate location. You can, however, direct the "find similar candidates" search in your preferences to use your default search location. The 2,500 character limitation that applies to the Conceptual Search does not apply to the "find similar candidates" search. The Last Update value and Place of Residence (location) are user preferences that can be defined in My Setup.

Performing a "find similar candidates" search using a candidate file that contains no information in any of the list of fields used in the Conceptual Search retrieves no candidates and even displays a message informing the end user that the selected candidate cannot return any candidate. A candidate selected as a reference for a Conceptual Search must have significant text information, like an attached resume or a plain text pasted resume.

The "find similar candidates" search can be performed for one candidate file at a time.

The "find similar candidates" is available for all types of job submissions, including hourly candidate job submissions.

## Finding Similar Candidates

A user type permission grants users access to this feature.

1. In the candidate list, select a candidate.
2. Click the Find Similar Candidates icon.

The Search Results list displays a list of candidates that match the selected candidate file.



## Searching for Candidates Matching Job Description and Qualifications

Users can find candidates who match the external job description and qualifications of a requisition.

This type of search can be performed from within a requisition file by using the Find Similar Candidates icon.

The External Job Description and Qualifications fields are used as search criteria. It is as if you could paste the entire description and the qualifications in the Keywords field in the advanced search and there was no 2,500-character limit. In addition to these two fields, the system uses the default value for the Last Update field and Place of Residence field coming from the user's preferences in My Setup. If no place of residence is specified in the user's preferences, the location specified in the requisition is used.

The place of residence used for searching is based on the Taleo Network Locations, while the location specified in a requisition is associated with a customer-defined location. The latter location is usually mapped to a Network location and this is the location used for searches.

This type of search can be performed for one requisition file at a time.

## Searching for Candidates Matching Job Description and Qualifications

A user type permission grants users access to this feature.

1. Open a requisition file.
2. Click the Find Similar Candidates icon.

Candidate files that best match the external job description and qualifications contained in a requisition are displayed. The search results can include candidates who have already been matched to the requisition.

## General Profile Search

It is possible to return search results of candidates who have only submitted a general profile but have not yet applied on any specific requisition.

When this feature is enabled, users may add the "Exclude candidates who applied on requisitions" search criteria in the advanced search form and decide to search only for candidates who have submitted a general profile but have not yet applied for a specific position. This feature helps to ensure candidates who do not apply for a specific job are also considered.

## Exclusion of Agency Owned Candidates in Search Results

Agency owned candidates can be excluded from candidate search results.

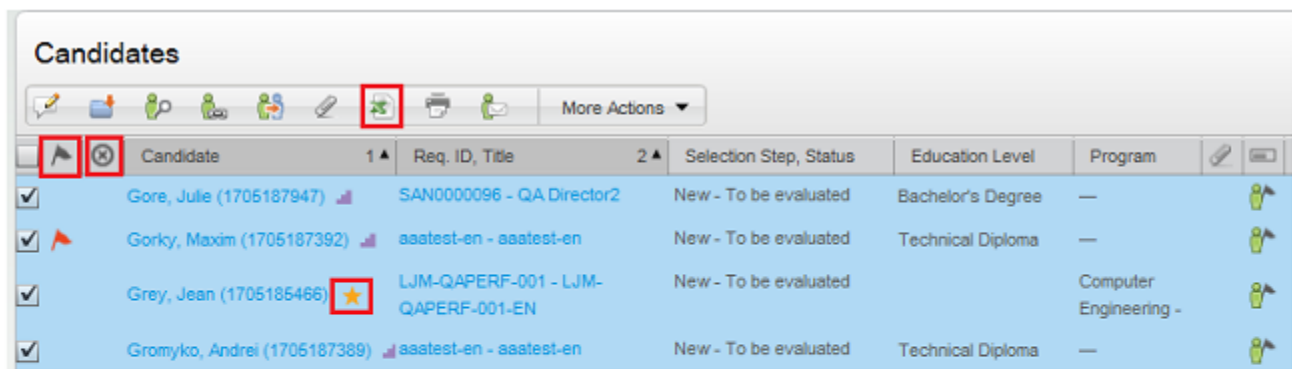
When this feature is enabled, users may add the "Exclude candidates owned by agencies" search criteria in the advanced search form and decide to include or not agency owned candidates in search results.

## Exporting Candidate Search Results to Microsoft Excel

Recruiting Center users can export candidates in a candidate list to a Microsoft Excel spreadsheet.

The Download as Excel icon is available on all candidate lists. When selecting candidates and clicking that icon, the selected set of candidates is exported to an Excel spreadsheet.

Columns in the Excel file are determined by the actual columns displayed in the candidate list. In the case of a column represented by an icon (such as the Item Requiring Attention icon), the column header will display the icon value (for example, Item Requiring Attention). In the case of a field with a boolean value, the table cell will display True or False. In the case of a field with multiple values, the table cell will display the actual text value.



A	B	C	D	E	F	G	H
Profile	Item requiring attention	Disqualification Question Result	Anonymous	Last Name	First Name	Identification Number	ACE Candidate
<a href="#">View</a>	False		False	Gore	Julie	1705187947	False
<a href="#">View</a>	True		False	Gorky	Maxim	1705187392	False
<a href="#">View</a>	False		False	Grey	Jean	1705185466	True
<a href="#">View</a>	False		False	Gromyko	Andrei	1705187389	False

The Excel spreadsheet contains a View link for each candidate file. When users click the View link, they are taken directly to the candidate job submission.

The columns in the Excel spreadsheet are governed by the underlying list format. Users cannot specify a subset of columns to be exported into the Excel spreadsheet.

## Search Query

A search query is an advanced candidate search that has been saved in order to be used repetitively and potentially shared with other Recruiting Center users.

A search query is a set of search criteria selected by a Recruiting Center user to perform an advanced candidate search. Each time an advanced search is performed, a search query can be created. A search query can be used as a basis for future searches and can be changed to narrow or broaden search results when needed.

The search query feature is available at the top right hand corner of the Recruiting Center pages.



Users can save a search query if the feature is activated in the user's configuration profile and if the user type permission has been granted. The fields that can be selected in the Recruiting Center to customize a search query are set by the system administrator for each configuration profile. If a user is not linked to a configuration profile or is linked to a configuration profile for which the system administrator has not selected additional fields, then only the set of default fields are displayed when customizing a search query in the Recruiting Center.

Two types of queries can be created:

- Personal search queries will remain available only to the user that created the query.
- Shared search queries are queries that are made available to selected users.

Search queries can be saved in folders. For details, see [Folder](#).

## Saving an Advanced Candidate Search Query

A user type permission grants users access to this feature.

1. In the top right-hand corner, click Advanced Search.
2. Enter information in the fields.
3. Click Save Query...
4. Enter information in the fields.
5. Click Done.

The search query is available in the Search Queries window. Users will be able to repeat the same search in the future using the same fields and their respective values.

## Adding a Search Criterion to an Advanced Candidate Search Query

A user type permission grants users access to this feature.

1. In the top right-hand corner, click Search Queries.
2. Click on a search query.
3. Click Customize...
4. Click Select next to the criterion you want to add.
5. Click Done.

## Removing a Search Criterion from an Advanced Candidate Search Query

A user type permission grants users access to this feature.

1. In the top right-hand corner, click Search Queries.
2. Click on a search query.
3. Click Customize...
4. Click the Remove icon next to the criterion you want to remove.
5. Click Done.

## Duplicating a Saved Search Query

A user type permission grants users access to this feature.

1. Click Search Queries.
2. Open an existing query.
3. Click the Duplicate Search Query icon.
4. Complete fields.
5. Click Done.

The query created from the duplication of another query is saved in the selected folder.

## Editing the Search Query Properties

A user type permission grants users access to this feature.

1. Click Search Query.
2. Open a search query.
3. Click Properties.
4. Make desired changes.
5. Click Done.

## Deleting an Advanced Candidate Search Query

A user type permission grants users access to this feature.

1. In the top right-hand corner, click Search Queries.
2. Select a search query.
3. Click the Delete icon.

The search query is no longer available in the Search Queries window.

# Folder Management

## Folder

In the Recruiting Center, folders are used for organizing candidate files and search queries.

Recruiting Center users who have been granted the proper permissions can organize folders in ways that best suit their needs. They can store candidate files as well as candidate search queries in folders. They can create, delete, and rename folders and they can also share folders with other users.

The Folder tab is available in the left panel of the Candidates list and Search Queries list.



## Creating a Folder

A user type permission grants users access to this feature.

1. Click the Folder tab located in the left pane of the Candidates list or Search Queries page.
2. Select the Personal folder.
3. Click Manage.
4. Select Create.
5. Enter the folder name in the blank field that appears.
6. Press Enter.

A new folder appears in your personal list of folders to organize candidate files or search queries.

## Deleting a Folder

A user type permission grants users access to this feature.

Files included in the folder must not be opened by another user.

1. Click the Folder tab located in the left pane of the Candidates list or Search Queries page.
2. Select a folder.
3. Click Manage.
4. Select Delete.

The folder is removed from your personal list of folders.

## Renaming a Folder

A user type permission grants users access to this feature.

1. Click the Folder tab located in the left pane of the Candidates list or Search Queries page.
2. Select a folder.
3. Click Manage.
4. Click Rename.
5. Enter a new folder name.
6. Press Enter.

## Moving a Folder

A user type permission grants users access to this feature.

1. Click the Folder tab located in the left pane of the Candidates list or Search Queries page.
2. Select a folder.
3. Click Manage.
4. Click File In...
5. Select the desired personal folder.
6. Drag the folder in the desired folder.
7. Click Yes in the message that appears.

The personal folder is moved into another folder.

## Modifying the Properties of a Folder

A user type permission grants users access to this feature.

1. Click the Folder tab located in the left pane of the Candidates list or Search Queries page.
2. Select a folder.
3. Click Manage.
4. Select Properties...
5. Enter information in the fields.
6. Click Done.

A name, an owner and comments are specified for the folder.

## Sharing a Folder

A user type permission grants users access to this feature.

1. Click the Folder tab located in the left pane of the Candidates list or Search Queries page.
2. Select a folder.
3. Click Manage.

4. Click Sharing...
5. Specify the users and/or groups who can have access to the folder.
6. Click Done.

The folder is available in the Shared folders section and a hand appears below the folder to show that it is shared. When users share a folder, they will not see their own folder in the "shared" directory. Shared folders are only available to users who have been granted the permission to access shared folders.

## Storing a File in a Folder

Allows users to put a file in a folder in order to consult it later on.

1. Click the Folder tab located in the Candidates list or the Search Queries page.
2. Select an element to file in a folder.
3. Select a folder. You can also create a new folder if the ones available do not suit your needs.
4. Click Done.

## Candidate Creation

### Candidate Creation

Recruiting Center users can create candidate general profiles and job-specific submissions.

The creation of candidates is done via the Create Candidate feature which is available in the home page as well as in the Candidates list via the More Actions list. This feature is available to users if they have been granted the proper user type permission; it also depends to which creation file the user's configuration profile was granted access to.

When selecting the Create Candidate action, the Create a Candidate assistant is launched. Users can create a general profile or a job-specific submission if these two types of files have been activated by the system administrator.

**Note:** When creating a candidate general profile or job-specific submission, the file presented to users does not take into consideration security level permissions in view and edit modes for those users and will allow them to input data into all the fields no matter the security level permissions granted or the security level set for the fields.

After deciding on the type of file to create, users have to select a template to create the candidate file. Templates are used to capture general profiles, job-specific submissions or referrals. The templates provided are based on the selected requisitions and their staffing type. All users do not have the same list of templates since the system administrator can activate a different set of templates for different configuration profiles.

During the creation process, the Resume Parsing option is available to extract key data elements from a candidate's resume and to use these data elements to automatically populate fields in the application. The candidate's resume cannot exceed 100 kilobytes or the size defined by the system administrator. It must also have the proper file format as defined by the system administrator. Resume Parsing has no impact on the formatting of a text (bold, italics, bullets). It can detect text in the header and footer. The following data elements are extracted from the candidate's resume:

#### Candidate Personal Information

- First Name

- Last Name
- Middle Name
- Address
- City
- Zip/Postal Code
- Home Phone Number
- Email Address
- Place of Residence
- Pasted Resume

### **Education**

- Education Level
- Graduation Date
- Start Date
- Institution
- Program

### **Work Experience**

- Start Date
- End Date
- Employer
- Job Function
- Responsibility

Before creating the actual candidate file, a duplicate check has to be performed to find out if the candidate already exists in the database. The following fields can be used for the duplicate check:

- First Name
- Last Name
- Middle Name
- Email Address
- Street Address
- City
- Phone Numbers (home, work, cellular, pager, or fax)
- Social Security Number

If duplicates are found, the system displays them in a list. Users can select the candidate file and edit the file. If no duplicates are found or if duplicates are found and the candidate is not on the list, users can create a new candidate file OR modify the duplicate search criteria and perform a new duplicate check.

When the candidate file template appears, users have to complete the required fields. The layout of the file is presented as a long form containing sections, blocks of information and fields selected by the system administrator.



## Creating a Candidate File

The information you will need to provide depends on the flow and options configured by the system administrator.

A user type permission grants users access to this feature.

1. In the Candidates list, select Create Candidate... in the More Actions list.
2. Select the Create a general profile option.
3. Select a candidate file creation template.
4. Select the language in which you want to create the candidate file.
5. Select the folder where you want to save the candidate file.
6. Indicate whether or not you want to use the Resume Parsing feature.

The file must not exceed 100 kilobytes and its format must be one of the following: Word (.doc, .docx), WordPerfect (.wpd), Text (.txt), Rich Text Format (.rtf), Hypertext Markup Language (.html, .htm), Portable Document Format (.pdf), Excel (.xls, .xlsx), OpenOffice Writer (.odt). Also, the processing of resumes written in other languages than the submission language might not be supported.

7. In the Duplicate Check step, provide information to make sure the candidate is not already registered into the database.
  - a. If duplicates are found, the system displays them in a list. You can select the candidate file and edit the file.
  - b. If no duplicates are found or if duplicates are found and the candidate is not on the list, you can create a new candidate file OR modify the duplicate search criteria and perform a new duplicate check.

## Creating a Candidate Job-Specific Submission

The information you will need to provide depends on the flow and options configured by the system administrator.

A user type permission grants users access to this feature.

1. In the Candidates list, select Create Candidate... in the More Actions list.
2. Select the Create a job-specific submission option.
3. Select the language in which you want to create the candidate submission.
4. Select the requisition for which the candidate is applying.
5. Select a candidate file creation template.
6. Indicate whether or not you want to use the Resume Parsing feature.

The file must not exceed 100 kilobytes and its format must be one of the following: Word (.doc, .docx), WordPerfect (.wpd), Text (.txt), Rich Text Format (.rtf), Hypertext Markup Language (.html, .htm), Portable Document Format (.pdf), Excel (.xls, .xlsx), OpenOffice Writer (.odt). Also, the processing of resumes written in other languages than the submission language might not be supported.

7. In the Duplicate Check step, provide information to make sure the candidate is not already registered into the database.
  - a. If duplicates are found, the system displays them in a list. You can select the candidate file and edit the file.
  - b. If no duplicates are found or if duplicates are found and the candidate is not on the list, you can create a new candidate file OR modify the duplicate search criteria and perform a new duplicate check.

# Candidate

A candidate is a person that applied on a job, that submitted a profile, or that was referred.

A candidate is a person:

- who has submitted a profile
- who has created a job submission
- for which a profile has been created by a user
- for which a job submission has been created by a user
- who has been referred by an agent for a job opening
- who has been referred by a friend for a job opening
- whose profile has been submitted by an agent
- whose profile has been submitted by a referrer
- who has been created by a Recruiting system user

## Details regarding internal and external candidates

Candidate's internal/external state is tracked in the general profile and at the job submission level.

In the General Profile: Internal candidates are identified by the Internal Candidate icon. This icon is displayed in the candidate card located on the left pane and in the candidate list. In general, candidates applying on a job or submitting their profile from an internal career section are automatically considered internal candidates. All other candidates are considered external candidates by default. However, if coming from an external career section and if the application flow is configured to allow it, candidates applying from external career sections can indicate that they are internal candidates and will receive the internal designation. In addition, Recruiting Center users may change the internal/external state of a candidate directly in the candidate file by using the Internal Candidate check box (which is available in the Candidate Personal Information section of the candidate file, under the General Profile tab).

Recruiting Center users may also automatically identify a candidate as Internal so that candidates who reach the Hire/Hired status in a candidate selection workflow will automatically have their general profile updated to indicate Internal. The system will display the icon for those candidates in a candidate list. Candidates who have received the Internal designation at the general profile level are considered to be internal candidates on the general profile even if they applied via an external career section. Authorized system users or integrations are required to remove this designation from employees who leave the company. For integration and reporting purposes, this field is named "Candidate.InternalApplication".

In the Submission: Internal/external submissions are identified in the candidate submission, in the Submission Type field located under the candidate card. The internal/external state value is used to improve metrics and analysis. Because all hired candidates can become "internal" without an application level designation of Internal or External all hires might appear in metrics as "internal hires", which would be incorrect. Values for the Submission Type field are either External or Internal and this value is not currently editable. This field is derived strictly from the internal/external value on the candidates' profile at the time the job submission was completed. For integration and reporting purposes, this field is named "Application.IsInternal".

## Candidate Actions

### Editing a Candidate File

A user type permission grants users access to this feature.

1. In the Candidates list, click on the name of a candidate.
2. Click Edit under the Job Submission/General Profile tab.
3. Modify information as needed.
4. Click Save.

### Deleting a Candidate File

A user type permission grants users access to this feature.

1. Enter the name of the candidate in the search widget.
2. In the Quick Search Results list, select a candidate file.
3. In the More Actions list, select Delete Candidate.
4. Click Yes to confirm the deletion.

The candidate file is permanently removed from the database.

Candidates who were involved in any Onboarding (Transitions) process that has not been deleted first in Onboarding (Transitions) will not be deleted. Onboarding (Transitions) has its own automated task to delete older completed and canceled processes. If that task is run and no processes associated with a candidate remain, then the candidate can be deleted afterward using one of the deletion methods in the Recruiting Center.

It is impossible to delete an employee file (as opposed to a candidate file) in the Recruiting Center. This is by design. For example, it is impossible to delete candidates whose file contains a hiring manager, Organization, Location or Job Field (OLF), photo, etc.

### Deleting a Candidate Submission

A user type permission grants users access to this feature.

1. In the Candidates list, select a candidate file.
2. Select Delete Submission in the More Actions list.
3. Click Save and Close.

The candidate submission is removed from the requisition. The status of the candidate for the requisition is Deleted.

Candidates who were involved in any Onboarding (Transitions) process that has not been deleted first in Onboarding (Transitions) will not be deleted.

## Printing a Candidate File

A maximum of 50 candidate files can be printed at a time.

1. Select a candidate file.
2. Click the Print icon.
3. Specify printing parameters.
4. Click Create PDF.
5. Click in the page displaying the PDF.
6. In the Windows File menu, select Print.

## Unlocking a Candidate Account

A user type permission grants users access to this feature.

1. In the candidate file, select the General Profile tab.
2. Confirm the candidate identity.
3. In the Account Information section, click Unlock Account.

## Generating a Password for a Candidate Account

A user type permission grants user access to this feature.

1. Confirm the candidate identity.
2. In the candidate file, select the General Profile tab.
3. In the Account Information section, click Generate New Password.
4. Click Yes to confirm your choice.
5. Click OK.

A new password is generated at the candidate's request. The new system-generated password is temporary. The candidate will only be able to use this password once, at the next login. The system will then force the candidate to change the password.

## Changing the Internal/External State of a Candidate

A user type permission grants users access to this feature.

1. In the candidate file, select the General Profile tab. You may need to flip the candidate card on the left pane.
2. Click Edit.
3. In the Candidate Personal Information section, select or clear the Internal Candidate field.
4. Click Save and Close.

## Entering a Grade in a Candidate File

The action must have been added to a step of the candidate selection workflow.

The candidate must be in a step that includes the action Enter grade.

A user type permission grants users access to this feature.

1. In the candidate file, select Enter Grade... in the More Actions list.
2. Complete fields as required.
3. Click Done.

The grade is displayed in the History tab.

## Adding an Attachment to a Candidate File

A user type permission grants users access to this feature.

The file will be scanned for viruses. If a virus is detected, the file is not attached. The system displays file information or suggests attaching a different file.

1. Select a candidate file.
2. Click the Add Attachment icon.
3. Click Browse to select a file.
4. Indicate if you want to make the file visible to the candidate. By default, a maximum of five files visible to the candidate can be attached by the recruiter and the candidate.
5. Click Done.

## Removing an Attachment from a Candidate File

A user type permission grants users access to this feature.

1. In the candidate file, click on the Attachments tab.
2. Move the mouse over the name of an attachment.
3. Click the Remove icon.
4. In the warning window, confirm your deletion.

## Viewing Attachments in a Candidate File

1. In the candidate file, click on the Attachments tab.
2. In the Attachments list, click on the name of an attachment.

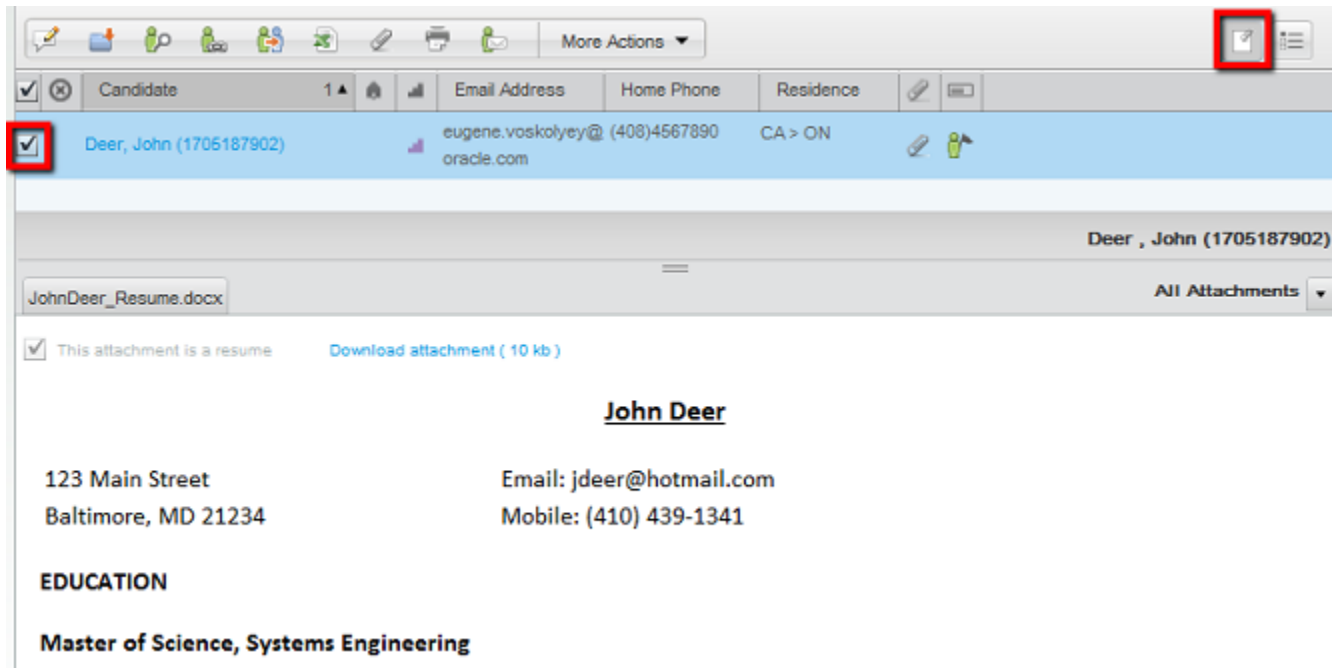
## Previewing Candidate Attachments in Candidates Lists

Recruiting Center users can quickly preview candidate attachments directly from a candidates list using a preview pane.

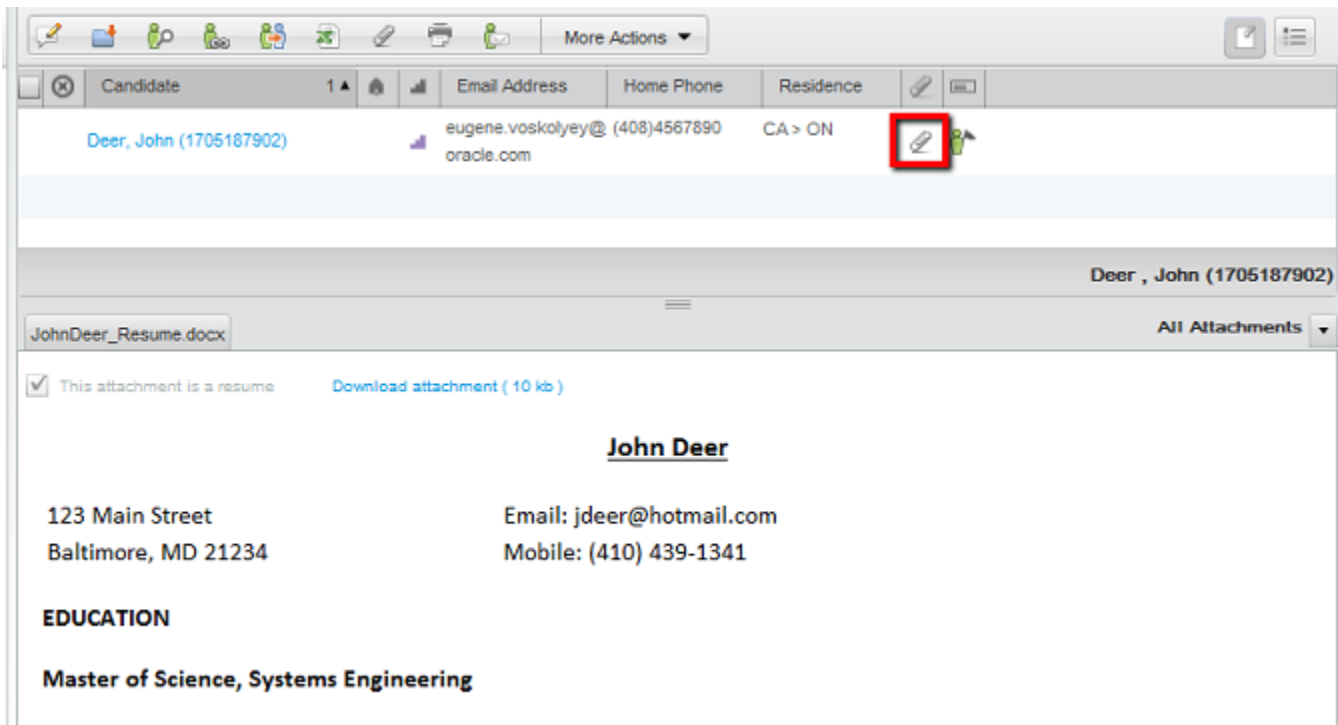
The candidates list provides a split screen which allows recruiters to preview candidate attachments without having to navigate away from the list.

There are two different ways to preview a candidate attachment:

1) By clicking the Show Attachment Preview icon located at the top of the candidates list and then selecting a candidate using the check box.



2) By clicking the Attachment icon on a candidate row. The Show Attachment Preview icon will be automatically enabled if it is turned off.



In the preview pane, files are converted into HTML and each attachment is displayed in its own tab. Recruiters can download the attachment or tag the attachment as being a resume. Recruiters can also choose to preview submission-specific attachments or other types of attachments. A splitter bar is available to resize the preview pane.

This feature is available in all candidate lists that is, the candidates list, the requisition-specific candidate list, the candidate search results list, the Folders tab and Talent Pools tab.

## Adding a Comment in a Candidate File

A user type permission grants users access to this feature.

1. In the candidate file, click the Add Comments icon.
2. Add a comment.
3. Click Done.

The comment is displayed in the candidate file History tab. Comments become searchable 10 or 15 minutes after being saved. Comments are not case sensitive and do not require quotation marks to be searched. Comments cannot be seen by the candidate.

## Modifying a Comment in the Candidate File History Tab

A user type permission grants users access to this feature.

1. In the candidate file, click on the History tab.
2. Click the Add Comments icon.
3. Modify the comment.
4. Click Done.

The modified comment is displayed in the Comments column of the History tab.

## Modifying Event Categories in the Candidate File History Tab

A user type permission grants users access to this feature.

1. In the candidate file, click on the History tab.
2. Click Modify.
3. Select the desired event categories.
4. Click Done.

Events related to the event categories selected will be displayed in the candidate file History tab.

## Modifying an Event Date in the Candidate File History Tab

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

1. In the candidate file, click on the History tab.
2. Click the Calendar icon next to the event.
3. Change the date.

The date of an event is modified in order to specify when an action on a candidate's file really took place.

## Moving a Candidate to the next Step

Candidate must be in a step that includes the Move action.

Candidate must be at a completion status.

Candidate must not be in the RSOffer step.

A user type permission grants users access to this feature.

1. Select a candidate.
2. Select Change Status/Step in the More Actions list.
3. Select a new step.



4. Optional: Create a self-assigned task by entering a name, due date, and description.  
It is currently not possible to setup a reminder to a self-assigned task when moving a candidate to the next step.
5. Optional: Send a correspondence.
6. Click Done.

## Moving Several Candidates to the Next Step

Candidates must be at the same step.

Candidates must be at a completion status.

Step must include the Move action.

Candidate must not be in a RSOffer step.

A user type permission grants users access to this feature.

1. Select several candidates.
2. Select Change Status/Step in the More Actions list.
3. Select a new step.
4. Optional: Create a self-assigned task by entering a name, due date, and description.
5. Optional: Send a correspondence.
6. Click Done.

## Moving a Candidate to Any Step

Candidate must be at a completion status.

Step must include the Bypass action.

Candidate must not be in a RSOffer step.

A user type permission grants users access to this feature.

1. Select a candidate.
2. Select Bypass from the More Actions list.
3. Select a new step.
4. Optional: Create a self-assigned task by entering a name, due date, and description.
5. Optional: Send a correspondence.
6. Click Done.

## Moving Several Candidates to Any Step

Candidates must be at the same step.

Candidates must be at a completion status.

Step must include the Bypass action.

Candidate must not be in a RSOffer step.

A user type permission grants users access to this feature.

1. Select several candidates.
2. Select Bypass in the More Actions list.
3. Select a new step.
4. Optional: Create a self-assigned task by entering a name, due date, and description.
5. Optional: Send a correspondence.
6. Click Done.

## Reverting to Step and Status Previously Reached

The step must include the Revert action.

The step must not be an RSOffer step.

1. In the candidate file, select Revert in the More Actions list.
2. In the Revert window, add a comment.
3. Click Done.

The candidate is moved back to the step and status previously reached.

## Changing the Status of a Candidate

Step in which the candidate is must include the Change Status action.

Candidate must not be in a RSOffer step.

A user type permission grants users access to this feature.

1. Select a candidate file.
2. In the More Actions list, select Change Status/Step.
3. Select a new status.
4. Click done.

The status of the candidate is changed.

## Changing the Status of Several Candidates

Step must include the Change Status action.

Candidate must not be in a RSOffer step.

A user type permission grants users access to this feature.

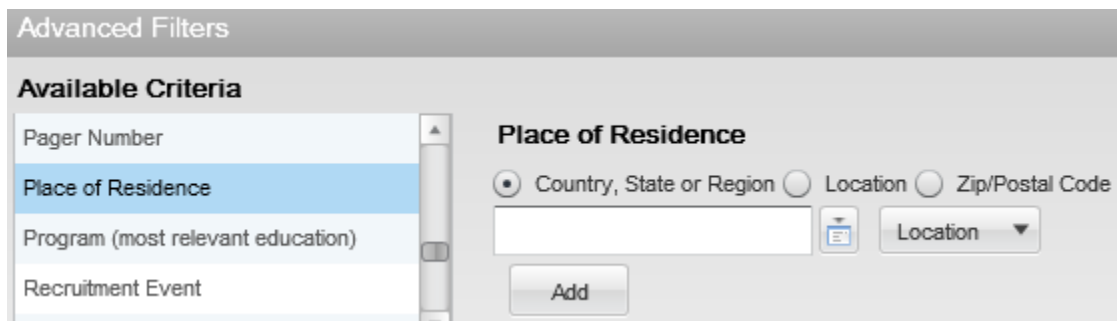
1. In a candidate list, select several candidate files.
2. In the More Actions list, select Change Status/Step.
3. Select a new status.
4. Click Done.

The status of several candidate is changed.

## Filtering Candidates Based on their Place of Residence

Recruiters can filter a list of candidates based on the distance between the candidate's place of residence and a central point, either a zip/postal code or a location.

The Place of Residence advanced filter is available for candidate lists and requisition-specific candidate lists.



The screenshot shows the 'Advanced Filters' interface. On the left, under 'Available Criteria', 'Place of Residence' is selected. On the right, under 'Place of Residence', the 'Country, State or Region' radio button is selected. Below the radio buttons is a text input field containing 'United States > California', a 'Location' dropdown menu, and an 'Add' button.

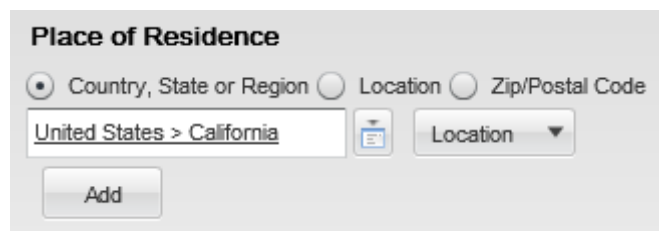
Only one place of residence filter can be used at a time. If you add a filter criterion while one was already selected, the new filter will replace the one previously selected. It is possible however to combine multiple place of residence filters when using an exact location. For example, you could select the filters United States > California and United States > Nevada.

When using radius filtering, the Miles or Kilometers distance unit is displayed according to the user's preferences (*Path: Resources > My Setup > Preferences > Default Distance Unit*).

### Place of Residence - Country, State or Region

When selecting the Country, State or Region option, the location selector displays reference locations.

When selecting a country and state region, the candidate list will be filtered to only show candidates whose place of residence is set to that specific country and state.



This is a close-up of the 'Place of Residence' filter. The 'Country, State or Region' radio button is selected. The text input field contains 'United States > California'. To the right is a 'Location' dropdown menu and an 'Add' button.

When selecting a region, the candidate list will be filtered to only show candidates whose place of residence is set to that specific region or within a specific distance of the selected region.

The screenshot shows the 'Place of Residence' form. At the top, there are three radio buttons: 'Country, State or Region' (selected), 'Location', and 'Zip/Postal Code'. Below the radio buttons is a text input field containing 'United States > California > Anaheim' and a small icon to its right. To the right of the input field is a dropdown menu with 'Within 10 Miles of Location' selected. Below the input field and dropdown is an 'Add' button.

When selecting a region (with no radius), the candidate list will be filtered to show candidates whose place of residence is set to that precise location or to a location that is lower in the hierarchy of that location (lower level). For example, if the selected location is "United States > California", candidates whose place of residence is set to "United States > California > Anaheim" will also be displayed.

The screenshot shows the 'Place of Residence' form. At the top, there are three radio buttons: 'Country, State or Region', 'Location' (selected), and 'Zip/Postal Code'. Below the radio buttons is a text input field containing 'United States > California > Anaheim' and a small icon to its right. To the right of the input field is a dropdown menu with 'Location' selected. Below the input field and dropdown is an 'Add' button.

### Place of Residence - Location

When selecting the Location option, the location selector displays customer's locations.

When selecting a location, the candidate list will be filtered to only show candidates whose place of residence is within a specific distance of the selected location.

The screenshot shows the 'Place of Residence' form. At the top, there are three radio buttons: 'Country, State or Region', 'Location' (selected), and 'Zip/Postal Code'. Below the radio buttons is a text input field containing 'United States > California > Sacramento' and a small icon to its right. To the right of the input field is a dropdown menu with 'Within 10 Miles of Location' selected. Below the input field and dropdown is an 'Add' button.

### Place of Residence - Zip/Postal Code

The Zip/Postal Code option is used to specify a zip code or postal code as well as the country to which this code belongs to filter the candidate list to only show candidates whose place of residence is within a specific distance of the zip/postal code.

If an invalid zip/postal code is entered or if the system cannot perform a radius filtering for the selected country, an error message will be displayed inviting the user to select a different country or zip/postal code.

**Place of Residence**

Country, State or Region  Location  Zip/Postal Code

**Note:** When a user enters a location and a radius, the location's geo-code (that is, the latitude and longitude) is calculated and the radial distance is used to find the geo-boundary. Once the geo-boundary is calculated, the filtering is done based on whether the candidate's place of residence is within this area, with the help of the geo-code of the candidate's place of residence. If a candidate's place of residence does not have a geo-code (the place of residence is set to a country or state), this candidate will not be displayed.

## Viewing Completed Submissions in Lists

Recruiters can view and sort candidate submissions based on the date when a job submission was completed.

This feature allows recruiters to look through a list of candidate submissions from top to bottom, where the candidate submission on the top is the oldest and the one at the bottom is the most recent. In some companies, this way of screening is mandatory as selection is performed in a first come first serve manner. To do this, the recruiter must see and sort on the submission completion date (ascending order) such that the oldest submissions are displayed on the top and the recruiter goes down through the list one candidate at a time. In addition to this, the correct filter must be activated in order not to include submissions that are not completed.

If the column Submission Complete was added to requisition-specific candidate lists, information in the column appears as follows:

- A blank value means that the submission has not yet been completed.
- Dates are displayed using the format configured in Regional Settings, under the SmartOrg Administration (used throughout the system).
- Ascending sorting (arrow pointing upwards) displays the oldest submissions at the top of the list. Note that when sorting on the Submission Complete Date column, blank values (incomplete submissions) are always displayed at the bottom of the list, whether sorting in an ascending or descending order.

Job submissions are considered complete when:

- A candidate completed a job submission and clicked the Submit button.
- A candidate (usually internal candidate) refers someone when creating or updating a submission.
- An agent refers someone when creating or updating a submission.
- A recruiter matches a candidate to a requisition (when creating a new job submission or when a match is done with an incomplete job submission).
- An import is done on a job submission.
- A candidate is hired on a job submission.

## Candidate Email Address Verification

Recruiters can verify whether candidate email addresses entered in the system are valid. Knowing that candidates have not validated their email address, recruiters can use alternate communication channels to send communications.

When administrators enable the feature, candidates are sent a message asking them to validate their email address. The message contains a link to the career section. Once candidates click the link, they are taken to the career section login page. On successful login, candidates see the message "Email successfully verified". If the validation fails, candidates see the message "Email verification failed" with a generic explanation. If the email address was already validated, candidates see the message "Email verification failed" with an explanation that their email address was already validated.

In Recruiting Center, recruiters can see that a candidate's email address was validated. The Email Validated icon appears in the candidates list. It also appears on the candidate card when viewing the general profile or submission of a candidate. The verification is done once per candidate unless the email address is changed.

A quick filter is also available to display candidates who have validated their email address.

**Note:** For existing candidates whose email address is yet to be validated, the email address validation message is sent if the candidate is active and when the candidate reaches the step as configured in the setting.

## Candidate Duplicate Check

### Checking for Duplicate Candidates

The Check for Duplicate action in the Recruiting Center allows users to verify if a candidate already exists in the database.

The Check for Duplicates action is available in the:

- Candidates list More Actions menu.
- Candidates list contextual action menu.
- Candidate file More Actions menu.
- Job-specific Candidates list More Actions menu.
- Job-specific Candidates list contextual action callout.

When selecting the Check for Duplicates action, the system performs a duplicate check against a duplicate check condition created by the system administrator. Candidates matching the condition are displayed in a Quick Search Results list. If two candidate files are duplicates, Recruiting Center users can then merge the files using the Merge Candidate Files icon.

## Checking for Duplicate Candidates

A user type permission grants users access to this feature.

1. In the Candidates list, select a candidate.
2. In the More Actions list, select Check for Duplicates...

If duplicates are found, they are listed in a Quick Search Results list.

## Candidate File Merge

### Candidate File Merge

Recruiting Center users can combine several candidate files into one file.

When using the Check for Duplicate action, or when in a candidates list, or after performing a quick search or advanced search, Recruiting Center users can select from two to ten candidate files and merge them using the Merge Candidate Files icon.

To verify if the selected candidate files are duplicate files, the system performs a duplicate check against a duplicate check condition created by the system administrator. Once the duplicate check is done, the system suggests a primary candidate file by selecting the candidate file that contains the most up-to-date information or the candidate file that was first referred in the case of a referral.

Users can specify a different file as the primary candidate file and remove unwanted candidate files.

Users can also select the order in which the duplicate files will be merged into the primary file. Information from a duplicate candidate file added to empty fields in the primary candidate file will not be overwritten with corresponding information from other duplicate candidate files positioned later in the merge process. For this reason, the order of files to be merged will affect the results.

When a merge occurs, the content of the duplicate files is added to the content of the primary candidate file.

**Note:** Special rules regarding the Education block, Work Experience block, and Certification block. Each block is evaluated using specific fields (Institution, Program, Education Level, Employer, Job Function, Expiration Date, Issue Date, Number/ID):

- If the content of the fields within each block is different, a new entry is added in the primary candidate file and the content is copied over.
- If the content of the fields within each block is identical, the data within the specific block is merged.

For the candidate address, the system considers the Date From and Date To fields.

- If the Date From field is different, the system looks at the Date To field. If the Date To field is also different, a new entry is added in the primary candidate file and the content is copied over.
- If no data is available in these fields, a new entry is added in the primary candidate file and the content is copied over.
- If the content of the two fields is identical, the data within the specific block is merged.

If the email notification option was selected when merging the candidate files, an email message is sent to the primary candidate or agent owning the primary candidate to inform the person that the candidate files were merged and to invite that person to review the new candidate file.

Files attached to the duplicate files are also merged. If the maximum number of attachments allowed per candidate is reached or exceeded, the attachments will be merged but candidates will not be able to add additional files.

When the merge occurs, candidate submissions are added to the primary candidate file. If submissions are in conflict with submissions in the primary candidate file, the submissions are not added to the primary candidate file.

The merging action can create multilingual candidate files. When merging candidate files with different languages, the primary candidate file will have multiple languages. The language of the primary candidate file will be used for the general correspondence. Submission-specific correspondence will be in the candidate's preferred language.

The merge action can be performed with candidate files having the following offer statuses:

- Draft
- Accepted
- Rescinded
- Canceled
- Reneged
- Approval Rejected
- Refused

Duplicate candidate files (that is, files that could be merged into the primary file) cannot be merged if:

- The candidate is already in an onboarding process.
- The candidate has a pending interview request.
- The candidate file has an employee file.
- The candidate file contains an incomplete external service request (that is, an open Passport transaction) such as a background check, a tax credit check, an assessment.

**Note:** Before starting an onboarding process or before hiring a candidate, it is a best practice to use the Duplicate Check feature to make sure there is no duplicate file before locking down the current candidate with the Onboarding (Transitions) process or by creating an employee file for performance management.

**Note:** Regarding Onboarding (Transitions): When two or more candidate files are merged, the selected primary candidate file is kept and possibly enriched with information from the other candidate files that will be deleted. Onboarding (Transitions) processes can be associated with the primary candidate file. If Onboarding (Transitions) processes (regardless of their status) are associated with any of the other candidate files involved in the merge, the merge will fail however.

## Merging Candidate Files

A user type permission grants users access to this feature.



The merge feature cannot be used if one of the duplicate candidate file is already in an onboarding process, contains a pending interview request, contains an incomplete external service request such as a background check, or a candidate file has an employee file.

1. In a candidates list, select candidate files.  
A maximum of ten candidate files can be selected.
2. Click the Merge Candidate Files icon.  
The system performs a duplicate check to verify if a candidate already exists in the database. Once the duplicate check is done, the system suggests a primary candidate file by selecting the candidate file that contains the most up-to-date information or the candidate file that was first referred in the case of a referral.
3. Optional: Use the drop-down list to select a different primary candidate file.
4. Optional: Use the Remove icon next to the candidate file name to remove unwanted duplicate candidate files.
5. Optional: Use the Reorder button to select the order in which the duplicate files will be merged into the primary file.
6. Specify if you want to send an email notification to the primary candidate or agent owning the primary candidate to inform the person that the candidate files were merged and to invite that person to review the new candidate file.
7. Click Done.

## Candidate Comparison

### Candidate Comparison

Recruiting Center users can display candidate files side by side for comparison purposes.

From a requisition-specific candidate list, a user can select two or more candidate files and invoke the Compare action in the More Actions list.

Up to four candidate files can be displayed simultaneously side by side. However, more than four candidate files can be compared. After expanding or collapsing sections of information to focus on the most interesting criteria for a given comparison of four candidate files, the user can click the Pin icon to lock a candidate file as being the reference against which the other candidate files will be compared. The user can scroll through the other candidates selected earlier, continue the comparison and remove unwanted candidates from the comparison view as needed using the using the small x in the top right corner of the column for the candidate.

The sections of information displayed when comparing candidate files match the blocks configured for the candidate file. The following fields are included in the compare process if they are present in the candidate file. UDFs (other than screening results) are not included among the fields being compared.

Block	Field
Basic Profile	<ul style="list-style-type: none"> <li>• Education Level</li> <li>• Job Level</li> <li>• Job Type</li> <li>• Schedule</li> <li>• Shift</li> <li>• Employee Status</li> </ul>

Block	Field
	<ul style="list-style-type: none"> <li>• Minimum Annual Salary</li> <li>• Currency</li> <li>• Travel</li> <li>• Advance Notice</li> <li>• Date of Availability</li> </ul>
Work Experience	<ul style="list-style-type: none"> <li>• Achievements</li> <li>• Current Job</li> <li>• Employer</li> <li>• Start Date</li> <li>• End Date</li> <li>• Job Function</li> <li>• Other Employer</li> <li>• Other Function</li> </ul>
Work Conditions	<ul style="list-style-type: none"> <li>• Currency</li> <li>• Expected Hourly Pay Rate</li> <li>• Hours per week willing to work</li> <li>• Hours per week, preferred</li> <li>• Willing to work on holidays</li> <li>• Willing to work on weekends</li> </ul>
Certifications	<ul style="list-style-type: none"> <li>• Certification</li> <li>• Expiration Date</li> <li>• Issue Date</li> <li>• Location</li> <li>• Organization</li> <li>• Other Certification</li> </ul>
Education	<ul style="list-style-type: none"> <li>• Program</li> <li>• Institution</li> <li>• Other Institution</li> <li>• Other Program</li> <li>• Start Date</li> <li>• Graduation Date</li> <li>• GPA / GPA out of</li> <li>• Graduated from High School or GED</li> <li>• City</li> </ul>
Prescreening	<ul style="list-style-type: none"> <li>• All questions</li> <li>• All competencies</li> </ul>

Block	Field
Shift Availability	<ul style="list-style-type: none"> <li>Grid</li> </ul>
Source Tracking	<ul style="list-style-type: none"> <li>Display source or event</li> </ul>
Screening Services	<ul style="list-style-type: none"> <li>Most recent result for each service</li> </ul>
Submission Medium	<ul style="list-style-type: none"> <li>Display Medium</li> </ul>
Contingent	<ul style="list-style-type: none"> <li>Bill Rate</li> <li>Charge Sales Tax</li> <li>Pay Rate</li> <li>Worker Type</li> </ul>

When comparing candidates, certain actions can be taken. The action will apply to all candidates residing in the compare window at the time the action is taken. Individual actions can also be taken using the drop-down arrow. Available actions are:

- Change Step/Status
- Bypass
- Revert
- Send Correspondence
- Add Comments
- Create Self-assigned Task
- Enter Grade
- File in a Folder
- Find Similar Candidates
- Match
- Share

## Comparing Candidate Files

Candidate files must be linked to the same requisition.

A user type permission grants users access to this feature.

A setting allows the activation of this feature.

1. In the Requisitions list, for the desired requisition, click on the number located in the Candidate Count column.
2. In the candidate list of the selected requisition, select candidates to compare.
3. In the More Actions list, select Compare...
4. Compare candidates as desired.

# Candidate Sharing

## Candidate Sharing

The Candidate Share functionality allows Recruiting Center users to share one or several candidate files with people via email. When sharing a candidate file, the system generates a PDF file containing candidate data.

The Share action is available in the candidates list and the candidate file toolbar.

**Note:** Sharing more than 50 candidate files is not recommended. If more than 50 candidate files are shared, the information shared will be limited to the Personal Information block. Sharing more than 50 candidate files can also affect system performance lengthening considerably the time required to complete the sharing action.

Two sharing modes are available (based on specific setting values):

- The legacy mode where one PDF is generated for each candidate being shared.
- The new mode where a single PDF containing the consolidated data and attachments of all shared candidates is generated and stored on the cloud.

### The legacy Candidate Share mode

When the legacy Candidate Share mode is used:

- A PDF is generated for each candidate being shared.
- A separate email is sent to each recipient, for each candidate being shared.
- The "Share Candidate Notification" message template is used and contains the PDF as well as the attachments.

### The new Candidate Share and Print mode (Flipbook)

When the new Candidate Share and Print mode is used:

- A single PDF containing the consolidated data and attachments of all shared candidates is generated and stored in the cloud.
- A single email is sent to each recipient (instead of one email per shared candidate).
- The message template called "Share Candidate Notification - Link to Access Shared Candidate Information" is used and contains a link to access the PDF and attachments in the cloud (instead of attaching the PDF file and attachments to the email). Token variables such as {Candidate.FullName} can be added to this message template but they will not be populated if more than one candidate is being shared. In such a case, there is only one message for several candidates.
- The generated PDF contains a Table of Contents so that users can easily navigate through the candidate files. Clicking the Bookmarks icon in the PDF displays the Table of Contents.
- If an attachment cannot be converted, a link to access it directly in the cloud is included in the PDF. A conversion log containing all conversion errors for all selected candidates is inserted at the beginning of the PDF. A "place holder" page is placed in PDF where the conversion file was to be located.

- While many common fonts are supported by the PDF converter used to generate PDFs, the system does not support all possible fonts candidates may decide to use as part of the documents they submit during their application.

**Note:** The Candidate Share and Print mode converts submission attachments as a PDF file. However, the PDF file may not be a pixel perfect representation of the original attachments. As a result, there will be formatting differences between the original document and the converted PDF version of the document. Starting version 13C MP7, the new Candidate Share and Print mode (Flipbook) embeds links to the original attachments shared. The links to these attachments are provided at the beginning of each candidate section. Users can click these links to open the original attachments. This allows users to download and view shared submission attachments. Users do not need to log in to access these attachments. The PDF conversion process for the new Candidate Share and Print mode supports UTF-8 encoding.

**Note:** The generated PDF contains links to the original attachments. When sharing candidates, users do not require authentication. The download starts as soon as the user clicks a link. However, when using batch printing to print the PDF, users will require authentication prior to being able to download attachments for security purposes.

**Note:** The Recruiting setting "Share Other Attachments" does not prevent users from printing a PDF including other attachments. When using bulk printing or when sharing multiple candidates/submissions, users will not see a difference when selecting chosen segments. However, the output will differ if the setting is enabled. For example, the printed document will include other attachments not flagged as relevant to the submission.

### Attachments in the generated PDF

Attachments can be included when sharing a candidate file. Three options are available:

- Most recent flagged resume
- Visible by candidate (Excludes flagged resume)
- Not visible by candidate (Excludes flagged resume)

### History Tracking in the Share Candidate Feature

The history can be included when sharing a candidate file.

If the History option is selected, the tracking events of the shared candidate is included. When sharing a general profile, only the related general profile history is shared. When sharing a job submission, only the history related to that job submission is shared.

Offer history information is included in the file if:

- The user sharing the file has the View offers permission.
- The user selects the Offer option in the Share Candidate assistant.
- The candidate file contains offer data. Offer data is not available when sharing multiple candidates.

### Candidate Sharing Behavior

When a user is sharing a candidate:

- Only the content that the user is allowed to access or that a company allows to share is available.

- The candidate file content that can be shared is defined by what the user can view. If a section is available to view, it will be available to share.
- Attachments can be shared depending on the user's ability to see attached files.
- Offer content can be selected for sharing if:
  - The user can view offer content.
  - The file being shared is a job submission.
  - The file contains offer data.
- Referrals can be shared.
- The history tracking can be shared.
- Tasks are never available to share.
- Approvals are never available to share.

When a recipient receives the shared candidate file:

- Sections that contain no data are removed from the shared file even if they were selected. Screening Services, eSignature and Regulation sub-sections are never included even if they are within a section of the candidate file that was included by the share sender when sending the share file.
- Shared files follow a restricted profile for field level security. Fields with a Confidential security level are never shared, and fields with the General or Restricted security level are always shared, regardless of the sharing user's permissions. As a result, the shared candidate file may include or exclude content that a user is otherwise able to see while in the Recruiting Center.
- Tasks are never included.
- Approvals are never included.

## Sharing a Candidate File

A user type permission grants users access to this feature.

A maximum of 50 candidate files can be shared at once.

1. Select one or multiple candidate files.
2. Click the Share Candidate icon.
3. Select a recipient. Two options are available:
  - You can add an external recipient by entering the email address of the person in the Email Address field.  
Or,
  - You can select a recipient entered in the system database.
4. Click Next.
5. Select content (sections) of the candidate file to share.
6. Click Share.

An email is sent to the recipient. If the Legacy Candidate Share mode is used, the "Share Candidate Notification" message template is sent to the recipient and it contains the PDF of the candidate file as well as the attachments. If the New Candidate Share mode is used, the message template called "Share Candidate Notification - Link to Access Shared Candidate Information" is sent to the recipient and it contains a link to access the PDF and attachments in the cloud (instead of attaching the PDF file and attachments to the email).

# Candidate Matching

## Candidate Matching to a Requisition

Recruiting Center users can select one or several candidate files and to match them to one or several requisition files.

The Matching action is available in the candidates list and the candidate file toolbar.

Basically, a user selects a candidate file and clicks the Add Candidates to Requisition icon. The system presents a list of requisitions. Requisitions are displayed by the system if they match the default matching requisition criteria set by the system administrator. These default criteria can be modified by the user to find more relevant requisitions for a particular candidate. This is done by clicking the Add Candidates to Requisition icon, selecting the Matching Requisitions option at the bottom of the quick filters and clicking the Modify Matching Criteria icon. Once a candidate has been matched to a requisition, the user can decide to send an email to the candidate to indicate that a match has been done and to obtain more information on the job application. Emails are sent only for posted requisitions, to avoid inviting candidates to requisitions they cannot see on the career section.

Matching criteria are:

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

Matching criteria (except for competencies and questions) can be set as desired or required:

- **Required:** The criterion is mandatory. A match must exist between the content of the candidate file and of the requisition file. If a requisition file meets the criterion, it will appear in the list of requisitions presented to the user.
- **Desired:** The criterion is an asset. A match is not required between the content of the candidate file and of the requisition file. Desired criteria are considered as a plus. A requisition file that does not match a desired criterion is not rejected.

Requisition files that meet all the required criteria and that also meet some desired criteria will appear at the top of the requisitions list presented to the user.

Competencies and questions criteria are considered as wildcards. If these criteria are not selected as required in the requisition, or if a candidate does not enter answers for these criteria, the answers will still be considered.

## Matching a Candidate to a Requisition

A candidate can only be matched to a requisition that has the Approved status.

A candidate file must not be identified as registered person (the Registered Person icon would appear beside the candidate name).

A user type permission grants users access to this feature.

1. Select a candidate file.
2. Click the Add Candidates to Requisition icon.
3. Click Select next to the desired requisition. If no requisitions are displayed, select different values in the quick filters.
4. Click Done.

Users selected a candidate file and matched it to a specific requisition. Selected candidate will be considered for the requisition.

## Modifying Matching Requisition Criteria

1. Select a candidate file.
2. Click the Add Candidates to Requisition icon.
3. In the Quick Filters pane, select the option Matching Requisitions and click the Modify Matching Criteria icon.
4. In the Matching Criteria window, modify criteria available in the tabs.
5. Click Done.

Criteria to find requisitions are modified to find a better fit for a candidate. The list of requisitions is modified according to the criteria selected.

## Emailing Candidates Matched to a Requisition

A user type permission grants users access to this feature.

1. In the requisition file, select the Posting and Sourcing tab.
2. In the Careers Section, select Preview Matching Candidate.
3. In the Postings Requisitions- Filter Matching candidates window, select candidates to email to.
4. Click Done.

An email is sent to selected candidates to invite them to apply on a job.



## Confirmed Candidate Accounts

Recruiters can know which candidates have viewed and confirmed their profile. This feature ensures that candidates had an opportunity to verify their profile content when their profile was sourced through recruiters, referrals, third party applications, or agencies.

When candidates get to the career section Thank You page, the system automatically marks their profile as being confirmed by the candidate. Recruiters are then able to know which candidates have confirmed their profile by viewing the Candidate Confirmed Account icon next to the candidate name.

## Candidate Original Submission Medium and Latest Submission Medium

Recruiting Center users can see which medium was used to submit information about a candidate initially and which medium was used most recently.

Submissions for a job can be entered into the system in a number of ways: candidates can apply through a standard or mobile career section; candidate submissions can also be submitted by way of an agency, a referral, or a match performed in the Recruiting Center. The candidates are later invited to visit the career section to complete the application workflow.

The Recruiting Center displays in the Profile section of the candidate file, two fields for medium:

- The Original Submission Medium field indicates the medium used when the candidate submission was submitted the first time. The Original Submission Medium is read-only.
- The Latest Submission Medium field indicates the medium used for the most recent submission. The Latest Submission Medium field is updated automatically when a submission is updated using a medium that is different from the one last used.

Recruiting Center users can manually indicate the most recent medium used by making a selection from the corresponding list. The list contains the following choices:

- Agency
- Email
- External Import: A value created to support future functionality for creating submissions from candidate information imported from external systems.
- Fax
- Import
- Internet Mining
- Matched to Job
- Online
- Online Mobile: A value associated with candidates who use a mobile career section.
- Phone
- Referral: A value associated with candidates created through an employee referral.

- Resume
- Staffing Station: Though unavailable for selection in the Create Candidate process because the Staffing Station is no longer offered, "Staffing Station" is still available for selection in the candidate file in edit mode. If the submission medium of a candidate was "Staffing Station" before migration, this value is retained for that candidate.
- Talent Exchange: Though unavailable for selection in the Create Candidate process because the Talent Exchange no longer exists, "Talent Exchange" is still available for selection in the candidate file in edit mode. If the submission medium of a candidate was "Talent Exchange" before migration, this value is retained for that candidate.

Recruiting Center users can configure list formats to include the Original Submission Medium and Latest Submission Medium in candidate lists.

## Candidate Interview

### Candidate Interview

A candidate interview is a formal meeting to evaluate the qualifications and work experience of a candidate.

Recruiting Center users can schedule, update and cancel interviews directly in the Recruiting Center. Attendees invited to a meeting receive an interview notification by email and they add the meeting to their calendars. Each time an interview is scheduled, updated or cancelled in the Recruiting Center, an email message is sent to selected attendees.

Here is how the candidate interview scheduling feature basically works.

A recruiter wants to interview a candidate for a job. For that, the candidate must be at the right interview step/status. From the Candidates list or the requisition-specific candidate list, the recruiter selects the candidate file and chooses the Schedule an Interview action in the More Actions list. The recruiter invites the candidate and can also invite other attendees to the interview meeting. The hiring manager of the requisition is invited by default. However, if the meeting organizer is the hiring manager, the recruiter is invited instead. Non-Recruiting Center users can also be invited to the meeting via their email address.

A default interview invitation message is proposed by the system. The most appropriate message template is pre-selected based on the requisition's Organization-Location-Job Field structure and the application language. However, it is possible to select another message.

If the recruiter has the appropriate permission, the recruiter can attach the candidate file and requisition file to the interview being scheduled and the message being sent.

When all the interview details are entered, the recruiter sends the interview meeting invitation.

The candidate, the meeting organizer and the attendees receive the interview meeting invitation by email and they can add the invitation directly into their calendars. If the candidate has no email address, the interview organizer can print the invitation and send it to the candidate by fax or regular mail.

After the interview meeting has been scheduled, the recruiter can view interview scheduling information in the candidate list Interview column and in the candidate file History tab. The Interview column must have been activated and added to the candidate list by the system administrator.

The recruiter also has the ability to update the interview meeting by changing the attendees, the schedule or other information, and also cancel the interview.

The candidate interview feature generates iCalendar entities that can then be integrated with any mail system that supports this specification, including Microsoft Outlook. Events occurring in MS Outlook calendar or any iCalendar system are not managed by Recruiting. For example, if an interview meeting is modified in Outlook, the new information will not appear in Recruiting.

MS Outlook 2000 and higher are supported. Other calendar products may be functional but are not officially supported.

When the candidate file and requisition file (or other candidate attachments) are included in the interview meeting invitation, these do not follow in the Calendar meeting.

A candidate can only have one interview scheduled per application at a time. If a candidate has no email address, users can still schedule an interview; they simply need to print the interview invitation and send it to the candidate by fax or regular mail.

**Note:** When scheduling or updating a 1st interview, the meeting organizer will not be able to add the appointment to the Outlook calendar using the ics link contained in the interview meeting invitation he will receive. This is a Microsoft Office issue that occurs with Outlook 2007 and Outlook 2010 (version 14). This issue is happening to meeting organizers only.

## File Attached to an Interview Invitation

Users can attach the candidate file and requisition file to the interview being scheduled and the message being sent.

The candidate file attached to the interview meeting never contains the Regulations block and Screening Services results. Blocks available in the candidate file do not display confidential information. Files attached to the candidate file (for example, a resume) are not included in the interview invitation.

The requisition file attached to the interview meeting never contains the Compensation block. Blocks available in the requisition file do not display confidential information.

User type permissions grant users access to the content of the candidate and requisition files. Depending on the user type permissions granted to the user scheduling the interview, some attendees may not have access to information they normally would have. The candidate will not receive the candidate file nor requisition file.

When the candidate file and requisition file (or other candidate attachments) are included in the interview meeting invitation, these do not follow in the Calendar meeting.

## Scheduling an Interview

The candidate must be at an interview step.

The candidate can only have one interview scheduled per requisition at a time.

The language icon in the Schedule an Interview page indicates the language in which the candidate submission was submitted; ensure that the interview information is in the candidate's language.

Validate email addresses of internal attendees before sending the interview request.

A user type permission grants users access to this feature.

1. In the candidate file, select Schedule an Interview... in the More Actions list.
2. Follow the on-screen instructions.
3. Click Done.
4. Change the status of the candidate to Scheduled.
5. Enter comments.
6. Click Done.

A formal meeting is organized with a candidate to obtain more information regarding their qualifications and work experience. An email message containing the interview details is sent to all attendees. Attendees can add the interview meeting in their calendar. Scheduling information is available in the candidate list Interview column as well as in the candidate file History tab.

## Changing Interview Attendees

Only one user at a time can modify interview information.

An interview must have been scheduled.

The candidate must have the scheduled status.

A user type permission grants users access to this feature.

1. In the candidate file, select Update the Interview... in the More Actions list.
2. Add or remove attendees.
3. Click Done.

An email message containing the interview details is sent to existing and new attendees. The email message is identical to the original message except that (Updated) appears in the subject of the email. Attendees that have been removed receive a cancellation message. The ics file attachment is now named "Update my calendar.ics". In the candidate file, the Tracking tab indicates that the interview has been updated.

## Changing Interview Information

Only one user at a time can modify interview information.

An interview must have been scheduled.

The candidate must have the scheduled status.

A user type permission grants users access to this feature.

1. In the candidate file, select Update the Interview... in the More Actions list.
2. Follow on-screen instructions.
3. Click Done.

An email message containing the interview details is sent to the attendees. The email message is identical to the original message except that (Updated) appears in the subject of the email. The ics file attachment is now named "Update my calendar.ics". In the candidate file, the Tracking tab indicates that the interview has been updated.

## Adding an Interview to MS Outlook

For MS Outlook 2000 and higher.

The iCalendar plug-in has been tested with Lotus Notes version 5.5 and higher.

Other calendar products may be functional but are not officially supported.

1. In MS Outlook, open the email containing the interview message.
2. Double-click the Add to my calendar.ics attachment.
3. Click Accept.
4. You can send a response to the meeting organizer.

The candidate interview invitation is added to the MS Outlook calendar. The subject, location, date and time of the meeting are recorded.

## Cancelling an Interview

An interview must have been scheduled.

A user cannot cancel an interview that is being updated by another user.

A user type permission grants users access to this feature.

1. In the candidate file, select Cancel the Interview... in the More Actions list.
2. Select to send or not a cancellation message to the candidate.
3. Select a new status for the candidate.
4. Enter comments.
5. Click Done.

An email message is sent to the attendees. The email message is identical to the original message except that (Canceled) appears in the subject of the email. The ics file attachment is now named "Remove from my calendar.ics". In the candidate file, the Tracking tab indicates that the interview has been canceled.

## Candidate Autopooling

### Automatic Candidate Pooling

The Automatic Candidate Pooling feature allows customers to add autopooling criteria to a requisition or requisition template to find candidates in the database who are available and qualified for a job. Managers can then access the autopool results with a single click.

The Automatic Candidate Pooling feature is typically used in decentralized hiring environments, for example in high volume retail and hourly hiring where managers may have to quickly identify candidates on their own without the assistance of recruiters.

For the Automatic Candidate Pooling feature to be available, the feature must be enabled by the system administrator. Users creating or defining autopooling criteria must be granted the required user type permissions, but no permission is required to access the autopool results.

Autopooling criteria can be added to a requisition via the Autopooling Criteria tab (if autopooling criteria were added to a requisition template, they will be inherited by the requisition). This is like a saved search that managers can use to find candidates who are both available and qualified. The following autopooling criteria may include any criteria from the Advanced Search, plus an additional set of basic criteria. For example:

- Exclude candidates in selection process
- Candidate's general profile language must match the requisition language
- Exclude expired job submissions (selected by default)
- Exclude rejected candidates - Within the last x days
- Exclude hired candidates - Within the last x days (selected by default)
- Candidate's place of residence - Within a radius of x kilometers/miles from the primary location of the job opening
- Submissions must match the following organization-location-job field structure

As a best practice, when defining autopooling criteria:

- Define autopooling criteria in requisition templates so criteria are inherited as requisitions are created.
- Define the widest possible set of candidates from the database that would be both qualified and available. This way, no time is wasted on unqualified or unavailable candidates. For example:
  - Set Organizations, Locations and Job Fields to only include candidates from other jobs with overlapping skills and/or who applied to nearby locations. Filter by Organization and Location if appropriate (specific country, specific division, etc.).
  - Exclude candidates being considered in another requisition, who were recently hired, whose submissions have expired.
  - Use the parameter to limit results to candidates who live within X kilometers/miles of the primary location of the requisition.

Once autopooling criteria have been defined and enabled, the system will automatically generate a list of candidates matching the criteria anytime on demand. Only candidates who have applied on another requisition will be considered. This list of candidates is accessible in the requisition-specific candidate list or in the requisition file via the Autopooling icon. A maximum of 300 candidates can be displayed. The user then has the ability to:

- View candidate files.
- Match candidates to the current job opening (candidates are moved from the autopool results list to the requisition-specific candidate list, and they can then be moved along the workflow like any other candidate).
- Match candidates to the current job opening and reject them in a single action (which will remove undesired candidates from continuing to appear in the candidate pool for this requisition; by default this option is disabled).
- Filter the list of candidates using quick filters defined by the system administrator.
- Sort the list of candidates by clicking a column heading.

When viewing a candidate file, the user may be able to view the other job applications that the candidate has submitted, depending on the permissions granted.

The user is able to match a candidate to the requisition via the autopooling feature even if the permission to match candidates to a requisition in general was not granted.

The user may also be able to match and reject candidates in one action if the permission was granted. When rejecting a candidate, the manager must specify the qualifiers (motives) and provide comments as required by the workflow.

If configured by the system administrator, the Automatic Candidate Pooling feature may also provide the ability to create optional repooling rules which automatically set a candidate's submission to an Inactive status after X days of inactivity. If the autopooling criteria for other jobs include the criteria to exclude candidates who are in a selection process, candidates who are automatically set to an inactive status will no longer be excluded and thus will be included in pool results.

## Defining Autopooling Criteria

The automatic candidate pooling feature must be activated.

A user type permission grants users access to this feature.

1. Click on a requisition or requisition template.
2. Click the Autopooling Criteria tab.
3. Click Edit.
4. Select autopooling criteria.
5. You can select advanced search criteria by clicking the Customize... button.
6. Click Save.

## Activating Autopooling Criteria

The automatic candidate pooling feature must be activated.

A user type permission grants users access to this feature.

1. Click on a requisition or requisition template.
2. Click the Autopooling Criteria tab.
3. Click Edit.
4. Select the Enabled status.
5. Click Save.

## Viewing Autopooling Criteria

The automatic candidate pooling feature must be activated.

A user type permission grants users access to this feature.

1. Click on a requisition or requisition template.
2. Click the Autopooling Criteria tab.

## Viewing the List of Automatically Pooled Candidates

The automatic candidate pooling feature must be activated.

Autopooling criteria must have been defined.

1. Open a requisition file or access a requisition-specific candidate list.
2. Click the Autopooling icon.

## Matching a Candidate to a Requisition via Autopooling

The automatic candidate pooling feature must be activated.

A user type permission grants users access to this feature.

1. Click on a requisition file or a requisition-specific candidate list.
2. Click the Autopooling icon.
3. Select a candidate file.
4. Click the Add Candidates to Requisition icon.
5. Specify if you wish to send an email to the candidate to request more information.

The candidate is matched to the current job opening. The candidate is moved from the autopool results list to the requisition-specific candidate list. The candidate can then be moved along the workflow like any other candidate.

## Rejecting a Candidate Selected via Autopooling

The automatic candidate pooling feature must be activated.

A user type permission grants users access to this feature.

1. Click on a requisition file or a requisition-specific candidate list.
2. Click the Autopooling icon.
3. Select a candidate file.
4. Click the Reject Candidate icon.
5. Specify the reason why the candidate was rejected.
6. Enter comments.
7. Click Done.

The candidate will no longer be in the candidate pool for this requisition.



# Candidate Referral

## Referring Candidates

A candidate can be referred by several referrers (agents and/or employees) and referral ownership can be set at the candidate profile level, the job submission level, or at both levels.

In previous releases, candidates could be referred on multiple jobs by a single referrer only. The referral ownership was kept at the candidate profile level, encompassing all job submissions done through all means by all actors. Now, a candidate can have multiple referrers (agents and employees) and candidate information is shared between multiple referrers.

How it Works for Agents	How it Works for Referrers (Usually Employees)	How it Works for Referred Candidates	How it works for Recruiters
<p>Agents can:</p> <ul style="list-style-type: none"> <li>Refer candidates who already exist in the database.</li> <li>Refer an already referred candidate at the job submission level.</li> <li>See candidate information entered by other referrers.</li> <li>Have a maximum number of job submissions referred per requisition.</li> </ul>	<p>Referrers can:</p> <ul style="list-style-type: none"> <li>Refer previously referred candidates.</li> <li>Refer an already referred candidate at the job submission level.</li> <li>See candidate information entered by other referrers.</li> </ul>	<p>Candidates can:</p> <ul style="list-style-type: none"> <li>Receive emails from multiple referrers.</li> </ul>	<p>Recruiters can:</p> <ul style="list-style-type: none"> <li>See various referrers for the same candidate.</li> <li>Might not always know there are referrers associated to a candidate. The fact that no agent is displayed in the candidate profile Referral tab does not mean that no agent referred the candidate. The referral might exist at the job submission level.</li> <li>See only the candidate profile referrer in search list and folder list.</li> </ul>

To allow agents and employees to refer candidates or candidate submissions that already exist in the database, settings must be configured by your system administrator.

A referrer can be the owner of a candidate job submission and also the owner of the candidate general profile. To support this candidate ownership mode, a setting must be configured by your system administrator. Three modes of ownership are available:

- Candidate Ownership:** The referrer is the owner of the candidate. Regardless of where the referral occurs (general profile or job submission), there is only one owner.
- Submission Ownership:** The referrer is the owner of the candidate job submission. The referral ownership is limited to where the job submission occurs. If the referral is done at the job submission level, only the referrer will have ownership of this job-specific submission. Referring a candidate general profile is possible but not recommended.

- **Submission and Candidate Ownership:** The referrer is the owner of the candidate job submission and the candidate general profile. The referral ownership is set on the job-specific submission but also on the candidate if the candidate is not already owned by a referrer.

In the Recruiting Center, when the Candidate Ownership mode is enabled, the candidate submission referrer is displayed in the candidate submission Referral tab. If there is no submission referrer, the candidate referrer is displayed. A submission-specific referrer can only exist if the ownership mode was changed to the Submission and Candidate Ownership mode or the Submission Ownership mode and was reverted to the Candidate Ownership mode.

In the Recruiting Center, when the Submission Ownership mode or the Submission and Candidate Ownership mode is enabled, only the local referrer is displayed in the candidate submission. If a candidate submission has no referrer, the candidate submission Referral tab is empty even if the candidate was referred at the profile level.

In the Career Section, under the Referrals tab, the display rules are always the same, regardless of the ownership mode selected.

In the Career Section, a referred candidate submission with an active link is always displayed, regardless of the setting enabled or the ownership mode selected. A non-referred candidate submission is only displayed if the candidate was referred. Candidate referrals are created for all referrals when the Candidate Ownership mode or the Candidate and Submission Ownership mode is enabled (they are not created when the Submission Ownership mode is enabled).

Customers can limit the number of candidate submissions a single agent can submit for a specific requisition. To support such a limit, a setting must be configured by your system administrator. When an agent reaches the limit set by the setting, this message is displayed to the agent: "You cannot refer this candidate because you have reached your maximum number of referrals for this requisition."

### **Important Information**

If the Candidate Ownership mode is enabled and a candidate is matched to a requisition, no job-specific ownership is created. If the Submission Ownership mode or the Candidate and Submission Ownership mode is enabled, the current ownership is carried over.

When the Submission Ownership mode or the Submission and Candidate Ownership mode is enabled, there are job-specific submissions with various referrers or no referrer. As such, the referrer ownership is only visible in the context where it applies and might not be visible in another context, like a non-referred job submission or a non-referred profile.

## Merge Form/Fill Out Form

### Merge Form

A merge form is a PDF document that can be tied to candidate selection workflows, steps, and statuses and that can be generated/filled out at any point on demand by a user.

Merge forms are used during the hiring process. For example, during interviews with candidates, a recruiter may use a PDF form as a template to complete a candidate's "Do not disclose" information. PDF forms are most typically used for various new hire paperwork or to print a candidate submission in a particular, customized format.

Merge forms are first built in Adobe Acrobat. System administrators then add them in the Recruiting Administration. If desired, they can also tie them to candidate selection workflows, steps, and statuses to make them available to users. Merge forms can be printed by a user, then further completed if needed and signed by the candidate. (None of this is tracked in the system).

If a field in the form is confidential to the user, a warning message is displayed and that field is left blank.

Merge forms can be pre-populated with variables retained in the system within the Message Template feature. These variables can be added using the Adobe Acrobat Professional Forms feature. For example, you could take a merge form (such as the I-9 form) and insert variables that will automatically pull information from the candidate file. Instead of typing the name of a candidate, the name would automatically appear in the form.

By default, the maximum file size of a merge form is 2 MB, and the maximum number of documents allowed per merge form (PDF) is 14.

Merge forms may be available in any language. Merged data is available in English only. Most Asian languages are not supported, based on PDF conversion issues with tokens. The merged data will pull what is in the candidates file, so it may not be in English.

## Using the Fill Out Form

The Fill Out Form action is available in a candidate list, a job-specific candidate list, a candidate file submission and a candidate general profile.

1. Click on a candidate.
2. In the More Actions list, select Fill Out Form.
3. In the Fill Out Form list, click on a form. Acrobat® Reader opens, displaying the form. The form is filled automatically using the corresponding fields of the candidate file or requisition.
4. Validate the information.
5. Click Print.

A PDF form containing information automatically generated by the system is created.

## Talent Pools

### Talent Pool

Talent pools created in Taleo Performance are available in the Recruiting Center.

A talent pool is a list of people nominated by pool collaborators. In Taleo Performance, talent pools can be created at anytime for any purpose, providing the flexibility to track unlimited groups of employees, such as high-potential employees, future leaders, and successors.

In the Recruiting Center, authorized users are able to see talent pools and match employees and candidates to their requisitions, file them into folders for additional pooling functionalities, or contact them directly.

The Talent Pool tab is available in the left panel of the Candidates list.



From the Talent Pool tab, users can select a talent pool to display the candidates and employees included in the pool. Users can also use quick filters (Internal, Referred, In selection process, Employer, Program) and advanced filters to filter the list down to relevant information. An advanced filter of interest is the Employee Potential which allows users to display candidates or employees with a low, medium, or high potential.

As with any other lists, actions can be performed on employees and candidates included in the talent pool using actions in the menu bar, in the More Actions list, and in the contextual action menu. Users can also select another list format or create a personalized list format.

## Employee Metrics

### Employee Metrics

Recruiting Center users are able to see employee metrics directly in the Candidates list and candidate file, to use employee metrics fields as advanced filters, and to search employee metrics.

The following key employee metrics are available in the Candidates list and candidate file. For these fields to be available, they must be configured and added in the candidate file user-defined form and in the candidates list format. If included, they are available to anyone based on field level confidentiality definition. If the Show Advanced Filters option is selected for the list format context, employee metrics become available as advanced filters in the Recruiting Center.

Employee metrics in the Candidates list and candidate file are:

- Competency Rating
- Employee Potential
- Employee Risk of Loss
- Goal Rating
- Last Review Rating
- Promotability Readiness
- Reassignment Candidate

The following key employee metrics are available in the Advanced Candidate Search page. For these fields to be available in the Advanced Candidate Search page, they must have been configured and added by the system administrator. Once added, they are available to anyone authorized to search internal candidates.

Employee Metrics in the Advanced Candidate Search	Available Values
Last Review Rating	Greater than or equal to a % between 0 and 100.
Potential	Low, Medium, High, Not Specified, Does Not Matter.
Reassignment Candidate	Yes, No, Not Specified, Does Not Matter.
Readiness for Promotion	Ready Now, Ready in 6 months, Ready in 1-2-3-4-5 years, Not Specified, Does Not Matter.
Risk of Loss	Low, Medium, High, Not Specified, Does Not Matter.

**Note:** The Last Review Rating is expressed as a % in the Recruiting Center; in Taleo Performance, it is expressed differently and it is a customizable scale.



# 7 Evaluation Management

## Evaluation Management Process

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

Different participants of an organization are involved in the evaluation process. Evaluation Management basically works as follows:

1. *The Library Manager creates evaluation categories.*
2. *The Library Manager creates evaluation questions.*
3. *The Library Manager creates evaluation skills.*
4. *The Library Manager creates evaluation questionnaires and adds questions and skills to them.*
5. *The Library Manager adds evaluation questionnaires to requisition templates.*
6. *Recruiters add evaluation questionnaires to requisitions.*
7. *Recruiters ask evaluators to evaluate candidates and evaluators provide feedback.*
8. *Recruiters view evaluation questionnaires completed by evaluators.*
9. *Recruiters create interviews.*
10. *Recruiters view interviews and evaluations details.*
11. *Interview participants respond to interview invitations.*

## Creating Evaluation Categories

Library Managers use the Evaluation Categories library to organize evaluation questions and questionnaires.

Evaluation categories are available in the Libraries tab of the Recruiting Center. A user type permission is required to access evaluation categories.

By default, all evaluation categories are displayed on the library. Use quick filters to refine the list by category or status (Draft, Active or Inactive). You can create new evaluation categories or modify existing ones. When you create an evaluation category, the category is created in your preferred language. Once a category is created, you can translate it. Languages for which a translation was provided are displayed in blue in the Activated Languages menu.

## Creating an Evaluation Category

A user type permission grants users access to this feature.

1. In the Libraries menu, select **Evaluation Categories**.
2. Click **Create**.
3. Provide a name for the category.
4. Select the language in which you want to create the category.

5. Activate the category.
6. Click **Save**.

## Creating Evaluation Questions

Library Managers maintain an up-to-date list of evaluation questions, skills, and questionnaires that are compliant with the organization policy.

Evaluation questions are available in the Libraries tab of the Recruiting Center. A user type permission is required to access evaluation questions.

Before creating a question, look at the existing questions in the Evaluation Questions library. Use quick filters to refine the list by question (enter one or multiple words), status (Active, Inactive, Draft), and category. You can filter the list using one or several criteria. Once questions are filtered, you can sort the list by clicking on the column header. If you don't see the question you are looking for, create a new one.

### Creating an Evaluation Question

A user type permission grants users access to this feature.

1. In the Libraries menu, select **Evaluation Questions**.
2. Click **Create**.
3. Complete the fields. See *Evaluation Question Properties*.
4. Click **Save**.

### Evaluation Question Properties

Question Property	Description
Answer Type	Four types of answer are available: <ul style="list-style-type: none"> <li>• Single: The person can select one answer from a list of choices.</li> <li>• Multiple: The person can select as many answers as applicable from a list of choices.</li> <li>• Text: The person can type a brief answer in response to a specific question.</li> <li>• Date: The person can provide a date to indicate for example, when a certification was obtained.</li> </ul>
Answer Display	Depending on the answer type selected, different answer displays are available. <ul style="list-style-type: none"> <li>• When using the Single answer type, the person can answer the question by selecting one radio button, or one value in a drop-down list.</li> <li>• When using the Multiple answer type, the person can answer the question by selecting one or several checkboxes, or by selecting one or several values in a drop-down list.</li> <li>• When using the Text answer type, the person can answer the question by typing text in a field. Between one and nine lines can be provided for the answer.</li> <li>• The Date answer type does no have any answer display.</li> </ul>
Question	Space provided to type the question. A question can have a maximum of 1000 characters. If the answer type is Single or Multiple, users will have the option to input possible answers.
Short Label	A short label for the question. The Short Label is not required. However, it is recommended to define one if using this functionality with Oracle HCM Cloud Mobile.



Question Property	Description
Possible Answers	When using the Single or Multiple answer type, you can enter possible answers. It is recommended to use a maximum of 10 possible answers.
Show Comment	When selecting Yes, a text box appears where evaluators will be able to enter justifications to the answers provided.
Status	Questions have one of the following statuses: <ul style="list-style-type: none"><li>• Draft</li><li>• Active</li><li>• Inactive</li></ul> By default, when creating a question, the question is in the Draft status. Once a question is in the Active status, only grammatical edits can be done.
Activated Languages	While creating a new question, translations can be created through the Activated Languages drop-down. Languages that have translated content are displayed in blue in the list. Translations should be entered prior to saving the question as Active.
Category	Category to classify the question.

## Creating Evaluation Skills

Library Managers create evaluation skills.

Skill based rating questions are available in Evaluation Management. Skills are added to evaluation questionnaires. Recruiters can evaluate candidates' skills using simple rating scales and they can compare candidates against each other and the desired skill level for the position. Charts provide users with a visual means of reviewing results and comparing responses.

Evaluation skills are available in the Libraries tab of the Recruiting Center. A user type permission is required to access evaluation skills.

Before creating a skill, look at the existing skills in the Evaluation Skills library. Use quick filters to refine the list by skill (enter one or multiple words), status (Active, Inactive, Draft), and category. You can filter the list using one or several criteria. Once skills are filtered, you can sort the list by clicking on the column header. If you don't see the skill you are looking for, create a new one.

## Creating an Evaluation Skill

A user type permission grants users access to this feature.

1. In the Libraries menu, select **Evaluation Skills**.
2. Click **Create**.
3. Complete the fields. See *Evaluation Skill Properties*.
4. Click **Save**.

## Evaluation Skill Properties

Property	Description
Answer Type	The answer type "Skill Rating Scale" is displayed by default. It cannot be changed.
Answer Display	The answer is always displayed with radio buttons.
Skill	The name of the skill. For example, Teamwork.
Short Label	Short name to identify the skill. Limited to 30 characters. The short label is not required. However, it is recommended to define one if using the functionality with an iPad.
Status	Skills can have one of three statuses: <ul style="list-style-type: none"> <li>• Draft</li> <li>• Active</li> <li>• Inactive</li> </ul> <p>When creating a new skill, you can only choose between draft and active. A skill must be saved in active status for the inactive status to become available for selection.</p>
Activated Languages	While creating a new skill, translations can be created through the Activated Languages drop-down. Languages that have translated content are displayed in blue in the list. Translations should be entered prior to saving the skill as Active.
Category	The category can be used to classify the skill. It is optional.

## Creating Evaluation Questionnaires

Library Managers create evaluation questionnaires and add questions and skills.

Evaluation questionnaires are available in the Libraries tab of the Recruiting Center. A user type permission is required to access evaluation questionnaires.

When you create a questionnaire, three tabs are available:

- **Properties:** This is where you provide general information about the questionnaire.
- **Questions:** This is where you add questions to the questionnaire. You can specify which questions are required when evaluators complete questionnaires. You can add weight values to question answer. You can also remove questions, reorder questions, and hide or show question details.
- **Skill Ratings:** Includes a button to select the rating scale to apply to the questionnaire. Rating scales are created by system administrators. Once the rating scale is selected, you can define which skills are required when evaluators complete questionnaires. You can add, remove, and reorder skills (which were defined in the Evaluation Skills library). Once skills have been added, you select the desired skill level for each skill.

## Creating an Evaluation Questionnaire

A user type permission grants users access to this feature.

1. In the Libraries menu, select **Evaluation Questionnaires**.

2. Click **Create**.
3. In the Properties tab, complete the fields. See *Evaluation Questionnaire Properties*.
4. In the Questions tab, click **Add** to add questions.
5. For each question, you can select the **Required** check box. When the Required check box is selected, a blue asterisk appears beside the question. Evaluators must answer the question when completing an evaluation questionnaire.  
If an evaluator attempts to submit the evaluation questionnaire without completing all the required content, a message will notify the evaluator of the unanswered, required items.
6. Add weight values to question answers.
7. In the Skills tab, click **Select Rating Scale** to add a skill ratings to apply to the questionnaire. Rating scales are created by system administrators.
8. Click **Add** to add skills.
9. For each skill, you can select the **Required** check box. When the Required check box is selected, a blue asterisk appears beside the skill. Evaluators must answer the skill when completing an evaluation questionnaire.
10. Select the desired skill level for each skill.
11. Click **Save**.

## Evaluation Questionnaire Properties

Questionnaire Property	Description
Questionnaire	Name of the questionnaire.
Short Label	A short label for the questionnaire. The Short Label is not required. However, it is recommended to define one if using this functionality with Oracle HCM Cloud Mobile.
Instructions	Instructions on how to complete the questionnaire. For example, how to evaluate potential candidates, explanations of any ranking system that might be used.
Include Question Section; Include Skill Rating Section; Include Overall Recommendation.	<p>Check boxes to make the Questions tab; the Skill Ratings tab and the Overall Recommendation available in the questionnaire.</p> <p>When selecting the Include Overall Recommendation check box, you can select the format of the Recommendation response. Possible formats are:</p> <ul style="list-style-type: none"> <li>• Text response: a text field to write the recommendation.</li> <li>• Radio selection: "Recommend" or "Do Not Recommend" selection inputs are presented to the evaluator.</li> <li>• Radio selection and text response: Combination of radio buttons with text field for supporting notes or justification of radio selection.</li> </ul>
Required	When the Required check box is selected, a blue asterisk appears beside the Recommendation field and evaluators must provide recommendations.
Status	<p>Questionnaires have one of the following statuses:</p> <ul style="list-style-type: none"> <li>• Draft</li> <li>• Active</li> <li>• Inactive</li> </ul> <p>By default, when creating a questionnaire, the questionnaire is in the Draft status. Once a questionnaire is in the Active status, only grammatical edits can be done.</p>
Activated Languages	While creating a new questionnaire, translations can be created through the Activated Languages drop-down. Languages that have translated content are displayed in blue in the list. Translations should be entered prior to saving the questionnaire as Active.

Questionnaire Property	Description
Category	Category to classify the questionnaire.

## Adding Evaluation Questionnaires to Requisition Templates

Library Managers can add evaluation questionnaires to requisition templates.

From the Interviews tab on the requisition template, you can add one or several questionnaires. Use quick filters to refine the list by questionnaire (enter one or multiple words) and category. You can filter the list using one or several criteria.

Once you added questionnaires to the requisition template, you can preview them to confirm they are appropriate for the requisition template. Questionnaires added to a requisition template will automatically be attached to requisitions created using that template.

## Adding an Evaluation Questionnaire to a Requisition Template

A user type permission grants users access to this feature.

1. In the Libraries menu, select **Templates**.
2. Open a requisition template.
3. Click the **Interviews** tab.
4. Click **Add**.
5. Use quick filters to filter the list of active questionnaires.  
In the Questionnaire field, you can search for a specific word contained in the title of a questionnaire. In the Category field, you can search for a specific category name by typing it in the Category field text box. Categories are available in the Evaluation Categories library.
6. Select one or multiple questionnaires.
7. Click **Save**.

## Adding Evaluation Questionnaires to Requisitions

Recruiters with the appropriate permissions can add evaluation questionnaires to requisitions.

From the Interviews tab on the requisition file, you can add one or several questionnaires. Use quick filters to refine the list of active questionnaires. You can filter the list using one or several criteria.

Once you added questionnaires to the requisition, you can preview them to confirm they are appropriate for the requisition.

Evaluation questionnaires can contain up to four collapsible sections:

- Questionnaire Information

- Questions
- Skill Ratings
- Recommendation

## Adding an Evaluation Questionnaire to a Requisition

A user type permission grants users access to this feature.

1. In the Requisitions list, click on a requisition.
2. Click the **Interviews** tab.
3. In the Resources section, click **Add**.
4. Use quick filters to filter the list of active questionnaires.  
In the Questionnaire field, you can search for a specific word contained in the title of a questionnaire. In the Category field, you can search for a specific category name by typing it in the Category field text box. Categories are available in the Evaluation Categories library.
5. Select one or multiple questionnaires.
6. Click **Save**.

## Asking Evaluators to Evaluate Candidates

Recruiters with the appropriate permissions can ask evaluators to evaluate candidates using evaluation questionnaires.

From the Interviews tab on the candidate job submission, you can create evaluation feedback requests. Once you select an evaluation and click the Send Request button, you can select evaluators from the list of users attached to the requisition and job submission. If you have the required permission, you can modify the displayed default expiration date. If not, you are presented with a read-only expiration date field. The expiration date is calculated based upon the expiration setting in Evaluation Management Administration. You must select one of the five request message templates. You can also include the candidate file, requisition file or job submission-specific attachments in the questionnaire being sent, valuable information for the person completing the evaluation.

Requests to complete evaluation questionnaires are emailed to evaluators. Upon accessing the link contained in the email, evaluators are directed to an HTML questionnaire where they can input their feedback responses. The questionnaire contains attached files. Evaluators provide their feedback. If they cannot complete the entire evaluation questionnaire in one session, they can click the Save as Draft button and come back at a later time to complete the evaluation. Once they have completed their feedback, they click the Submit button. Upon submitting their feedback, the link in the email is no longer active and evaluators cannot go back to the questionnaire.

You can also complete the evaluation questionnaire by clicking the Complete button found in the Resources section on the candidate's job submission. The system will display a blank copy of the questionnaire selected within the Interviews tab and you can fill it out.

Once a request has been sent to evaluators, the Interviews and Evaluation Requests section in the candidate submission and requisition Interviews tab will be updated to reflect the new request. All evaluation requests which have not yet expired are visible in this list. You can resend a request by selecting the evaluation request and clicking the Resend button. You can cancel a request by selecting the request and clicking the Cancel button.

## Sending an Evaluation Feedback Request to an Evaluator

A user type permission grants users access to this feature.

1. In the Requisitions list, click on a requisition.
2. Click on a candidate who applied on the requisition.
3. Click the **Interviews** tab.
4. In the Participants section, click **Add** to select the evaluators who will complete the evaluation questionnaire. Two options are available:
  - o You can add external evaluators by entering their first name, last name and email address.
  - o You can select evaluators entered in the system database. The Internal Evaluators list only displays the first 100 users. To find a user who is not displayed, use quick filters. If after applying quick filters more than 100 users were found, the list will still only display the first 100 users.
5. In the Questionnaires Attached to Requisition section, select an evaluation questionnaire.
6. Click **Send Request**.
7. Select the time zone of the questionnaire recipients.

By default, the system displays the user's preferred time zone (defined under Resources > My Setup > Preferences > Time Zone). If no user's preferred time zone is defined, the system will display the time zone set by the system administrator in the Evaluation Management Administration menu.
8. Select the message language of the questionnaire recipients.
9. The displayed default expiration date can be modified if the user has the required permission.
10. Select the message template that will be sent to evaluators requesting them to perform an evaluation.
11. In the File Share section, select the candidate file, requisition file and/or submission-specific attachments you want to share with the evaluator.
12. Click **Send** to send the feedback request to evaluators.

## Evaluating a Candidate Myself

A user type permission grants users access to this feature.

1. In the Requisitions list, click on a requisition.
2. Click on a candidate who applied on the requisition.
3. Click the **Interviews** tab.
4. In the Questionnaires Attached to Requisition section, select an evaluation questionnaire.
5. Click **Complete**.
6. Answer the questions and/or skill ratings presented in the questionnaire.
7. Click **Save** to submit the questionnaire.

## Viewing Completed Evaluation Questionnaires

Recruiters with appropriate permissions can access the requisition or candidate job submission and view feedback provided by evaluators.

Once evaluators have completed the evaluation, the completed questionnaire is available to review in both the requisition and the candidate job submission, under the Interviews tab. In the Completed Evaluations and Interviews section, you can see a list of all completed evaluations. The list displays the completion date and time, the candidate's

name (only applicable at the requisition level), the event type (either interview or feedback; evaluations associated with an interview also display the interview's title for example, "Interview - John Smith Phone Screen"), the evaluation title, the name of the person who completed the questionnaire and the question and/or skill score(s). You can view the results of a questionnaire by selecting the questionnaire and clicking View Results.

When viewing a completed questionnaire, you can toggle between the various views of completed questionnaires, which include:

- Document: Displays questions and rating skills with a checkmark next to the selected response.
- Details: Displays the evaluator's responses to questions and rating skills in an horizontal bar graph. If more than one evaluator has completed the same evaluation their responses will also appear in the graph. The desired skill level set for each rating is also displayed.
- Summary: Questions and rating skills are displayed alongside a graph that shows an average of all evaluator responses. The desired skill level set for each rating is depicted. An asterisk appears next to the bars that do not include all evaluators' responses.
- The average question score and average skill rating score are also displayed at the top of the page, next to the Response Display drop down menu.

Image: Document View - Rating Skill

Question	Answer	Weight	Score
1. Interview Date:	11/06/2013		
2. Interview Mode:	Phone	0	
	Skype	0	
	HDVC	0	
	✓ Face to Face	0	0
3. Interview Round:	✓ First	0	0
	Second	0	

Image: Details View - Rating Skill



Image: Summary View - Rating Skill



You can also remove a questionnaire that has been deemed to contain inappropriate content and to allow evaluators to complete it in a compliant format.

## Viewing the Results of a Completed Evaluation Questionnaire

A user type permission grants users access to this feature.

1. In the Requisitions list, click on a requisition.
2. On the requisition, navigate to the Interviews tab or click on a candidate who applied on the requisition and then navigate to the Interviews tab.
3. In the Completed Interviews and Evaluations section, select an evaluation questionnaire.
4. Click **View Results**.

## Creating Interviews

Recruiters can coordinate interviews with internal participants, including supporting evaluations and shared attachments and files.

You can create interviews at the job submission level by clicking the Create Interview button in the Interviews tab. The ability to create interviews is also available in the contextual action menu via an action called Coordinate Interview...

When creating an interview, you can create a panel, a single one-on-one interview, or a series of one-on-one interviews. You then specify interview properties such as participants, date, time and time zone, location, and required evaluation questionnaires.

### 1. Interview Properties

The screenshot shows the 'Interview Properties' form. At the top, there are four buttons: 'Add Interview', 'Add Participants', 'Modify All Dates', and 'Modify All Locations'. Below these are several sections:

- Interview:** A dropdown menu showing 'Frank Green Interview 1'.
- Participants:** A dropdown menu with 'Select User'.
- Date:** A date input field with a calendar icon.
- Time:** Two time input fields for 'Start' and 'End', both set to '8 AM :00', and a 'Time Zone' dropdown set to 'America/Los\_Angeles'.
- Questionnaires:** A list of checkboxes for 'Analyst (Screen)', 'Advisory', and 'New Hire Screening'.
- Location:** A text input field.
- Resources:** A text input field with a plus icon.

Once you added participants, click the Check Availability button to see the participants' calendar. By default, interviews scheduled through Evaluation Management are displayed. Hovering over an interview displays the interview title in a tooltip. To see other dates, use the arrows to see the previous and next days and the calendar selector to jump to a specific date. After selecting a date in the calendar selector, click the Check Availability button to refresh the data.

**Note:** If a Microsoft Office 365 integration is enabled, you can browse the Microsoft Office 365 directory to add participants to the interview. You are not limited to the Recruiting list of users. Once you added the desired participants and selected a target date and time for the interview, you can view the availability grid to determine the optimal time to schedule the interview.



Use the Notes to Participants field to add interview specific information that is displayed to participants on the invite accept/decline page and in message templates.

You can share the candidate file, requisition file as well as files attached to the job submission such as resumes and references with participants. Only files visible by the candidate are available for sharing.

Interview participants receive an invitation to participate in the interview. The invitation contains a link directing participants to a page where they can accept, decline, or request reschedule. Participants are also able to provide a note to the recruiter as part of their response. The recruiter will receive an email notification containing the participant response for that interview.

Upon accepting an interview, participants will receive a confirmation email that contains an .ics attachment for the interview that can be added to their Outlook calendar as well as links to any requested evaluations. The .ics attachment also contains the interview details as well as links to any associated evaluations.

## Creating a One-on-One Interview

A user type permission grants users access to this feature.

1. In the Requisitions list, click on a requisition.
2. On the left panel, click on candidates who applied for this requisition.
3. Click the Access Contextual Actions icon of a specific candidate and select **Coordinate Interview**.
4. In the Interviews and Evaluation Requests section, click **Create Interview**.
5. Select the **One-on-One interview** option.
6. Indicate the number of interviews you want to schedule for the candidate.
7. Click **Create**.

When creating more than one interview with the same date and location, you can click **Next** to save some time and steps. Enter the information once, and the same information will be applied to all the interviews. Up to 10 one-on-one interviews can be created at a time.

8. In the Interview Properties section, define elements such as the participants, the date, time and time zone, the location.
9. Click the **Check Availability** button to see the participants' calendar.
10. Select the correspondence language. The correspondence language determines the language presented to users on the participant accept/decline page and in notification and reminder messages.
11. Use the Notes to Participants field to add interview specific information that will be displayed to participants. The Notes to Participants field is available for use in message templates, .ics attachments and on the participant accept/decline page.
12. In the File Sharing section, select the files you want to send to participants. You can select the candidate file, requisition file as well as submission-specific attachments such as the candidate resume. Any files shared will be available to all interview participants (even external users who are not in the system database) on the accept/decline page and any associated evaluations.  
Note that only files visible by the candidate can be shared.
13. Click **Save and Close**.

## Create an Interview with Several Participants

A user type permission grants users access to this feature.

1. In the Requisitions list, click on a requisition.
2. On the left panel, click on candidates who applied for this requisition.
3. Click the Access Contextual Actions icon of a specific candidate and select **Coordinate Interview**.

4. In the Interviews and Evaluation Requests section, click **Create Interview**.
5. Select the **Panel** interview option.
6. Indicate the number of participants you want to invite to the interview. Two to ten participants can be included in a panel interview.
7. Click **Create**.
8. In the Interview Properties section, define elements such as the participants, the date, time and time zone, the location.
9. Click the **Check Availability** button to see the participants' calendar.
10. Select the correspondence language. The correspondence language determines the language presented to users on the participant accept/decline page and in notification and reminder messages.
11. Use the Notes to Participants field to add interview specific information that will be displayed to participants. The Notes to Participants field is available for use in message templates, .ics attachments and on the participant accept/decline page.
12. In the File Sharing section, select the files you want to send to participants. You can select the candidate file, requisition file as well as submission-specific attachments such as the candidate resume. Any files shared will be available to all interview participants (even external users who are not in the system database) on the accept/decline page and any associated evaluations.  
Only files visible by the candidate can be shared.
13. Click **Save and Close**.

## Viewing Interviews and Evaluations Details

Recruiters can view information on interviews and evaluations in the requisition file and candidate job submission. The candidate job submission contains the same sections and lists outlined on the requisition.

In the requisition file, the Interviews tab contains information on interviews and evaluation requests across all candidate's on the requisition.

The Interviews and Evaluation Requests section displays a list view of all active interviews and evaluation requests on that requisition. The date of the event, the type of event, the name of the candidate and participants as well as the status of the event are displayed. Possible interview statuses are: Accepted, Declined, Tentative, Reschedule Requested. Evaluations will only display a status of Requested. A warning icon indicates that one or more participants has declined or requested a reschedule. You can view the interview details and change its properties directly from the requisition.

Event Date	Candidate	Event Type	Details	Participants	Status
4/21/14 2:00 PM (America/Los Angeles)	Liz Jackson	Interview	Liz Jackson Team Interview	Jane Smith, John Jacks, Seetha Srinivasan, Jessica Reilly	🚨 Reschedule Requested (1)
4/18/14 11:59 PM (America/Los Angeles)	Liz Jackson	Feedback	New Hire Screening	Jessica Reilly	Requested
4/18/14 12:00 PM (America/Los Angeles)	Liz Jackson	Interview	Liz Jackson Interview 2	John Jacks	Tentative
4/18/14 12:00 PM (America/Los Angeles)	Frank Green	Interview	Frank Green Interview 3	John Jacks	Tentative
4/18/14 11:00 AM (America/Los Angeles)	Liz Jackson	Interview	Liz Jackson Interview 1	Jane Smith	Tentative
4/18/14 11:00 AM (America/Los Angeles)	Frank Green	Interview	Frank Green Interview 2	Jessica Reilly	🚨 Declined
4/17/14 10:00 AM (America/Los Angeles)	Frank Green	Interview	Frank Green Interview 1	Seetha Srinivasan	Tentative
4/15/14 9:00 AM (America/Los Angeles)	Liz Jackson	Interview	Liz Jackson Panel Interview	Jessica Reilly, Seetha Srinivasan	🚨 Declined (1)
4/8/14 11:59 PM (America/Los Angeles)	Peter Simon	Feedback	New Hire Screening	Seetha Srinivasan	Requested
3/21/14 8:00 AM (America/Los Angeles)	Peter Simon	Interview	Attachment test - no evals	Jessica Reilly	Accepted

The Completed Interviews and Evaluations section provides a list view of completed evaluation questionnaires and interviews. Click the View Results or the View Details button to view all the details of the interview or evaluation questionnaire. Once an interview date/time has passed it will appear in the Completed Interviews list. Interviews that were cancelled or declined do not appear in this list.

- Requisition
- Alerts
- Attachments
- Posting and Sourcing
- Autopooling Criteria
- History
- Reports
- Interviews

## 2. Completed Interviews and Evaluations

### Completed Evaluation Questionnaires

View Results Remove

6 found, displaying all.

Completed Date	Candidate	Event Type	Questionnaire	Participants	Question - Skill Score
4/3/14 8:08 AM	Liz Jackson	Interview - Liz Jackson Interview 1	New Hire Screening	Jessica Reilly	100 % - 0 %
4/3/14 8:03 AM	Liz Jackson	Interview - Liz Jackson Interview 1	Analyst (Screen)	Jessica Reilly	46 % - 70 %
4/2/14 12:57 PM	Liz Jackson	Feedback	Advisory	Jessica Reilly	71 % - 67 %
3/27/14 6:27 AM	Peter Simon	Feedback	New Hire Screening	Jessica Reilly	200 % - 0 %
3/19/14 8:18 AM	Peter Simon	Interview - Peter Simon Interview 1	New Hire Screening	Jessica Reilly	71 % - 0 %
3/12/14 6:13 AM	Peter Simon	Feedback	Advisory	Jessica Reilly	57 % - 78 %

### Completed Interviews

View Details

6 found, displaying all.

Event Date	Candidate	Interview Name	Participants	Questionnaires
4/3/14 11:00 AM	Liz Jackson	Liz Jackson Interview 3	Jane Smith	Advisory
4/3/14 10:00 AM	Liz Jackson	Liz Jackson Interview 2	Seetha Srinivasan	Analyst (Screen)
4/3/14 9:00 AM	Liz Jackson	Liz Jackson Interview 1	Jessica Reilly	Analyst (Screen), New Hire Screening
4/3/14 8:00 AM	Liz Jackson	Liz Jackson Panel Interview	John Jacks, Seetha Srinivasan,	

In the Resources section, you can preview, add, and remove questionnaires to the requisition as well as participants for use in evaluations and interviews.

## 3. Resources

### Questionnaires Attached to Requisition

Preview Add Remove

3 found, displaying all.

Questionnaire	Attached By	Date Attached
Advisory	Jessica Reilly	3/6/14 1:26 PM
New Hire Screening	Jessica Reilly	3/6/14 1:26 PM
Analyst (Screen)	Jessica Reilly	3/6/14 1:26 PM

### Participants

Add Remove

4 found, displaying all.

Participant	Attached By	Date Attached
Jane Smith	Jessica Reilly	3/25/14 1:04 PM
John Jacks	Jessica Reilly	3/25/14 1:04 PM
Seetha Srinivasan	Jessica Reilly	3/6/14 1:27 PM
Jessica Reilly	Jessica Reilly	3/6/14 1:27 PM

## Viewing the Details of an Interview

A user type permission grants users access to this feature.

1. In the Requisitions list, click on a requisition.
2. Click on a candidate who applied on the requisition. You can also view interview details on the Requisition Interviews tab.
3. Click the **Interviews** tab.
4. In the Interviews and Evaluation Requests section, select an interview.
5. Click **View Details**.

## Viewing the Details of a Completed Interview

A user type permission grants users access to this feature.

1. In the Requisitions list, click on a requisition.
2. Click on a candidate who applied on the requisition. You can also view interview details on the Requisition Interviews tab.
3. Click the **Interviews** tab.
4. In the Completed Interviews and Evaluations section, select an interview.
5. Click **View Details**.

## Responding to Interview Invitations

Interview participants receive an email invitation to respond to an interview invitation.

Interview participants receive an email invitation that contains a link that directs them to a page where they can provide their availability. Three responses are available: Accept, Decline, Request Reschedule. A Comments field allows interview participants to provide the interview coordinator with additional details such as a different interview date and time or additional participants to invite. Until a response is provided, the interview participant will be in the Tentative status when viewing the interview details in the Recruiting Center.

### Peter Simon - Phone Screen

#### Interview Information

Proposed Date and Time April 15, 2014 10:30 AM - 11:30 AM EST	Candidate Peter Simon	Requisition Sales Analyst	Interview Coordinator Jessica Reilly
Interviewers Jessica Reilly	Location Pleasanton Campus - Building 5805 Conference Room: 2804		

Notes to Participants

Please make sure to reach out to the interview coordinator if you have to reschedule this interview based on the candidate's schedule/availability. You can add the better or preferred interview date and time in the accept/decline comments.

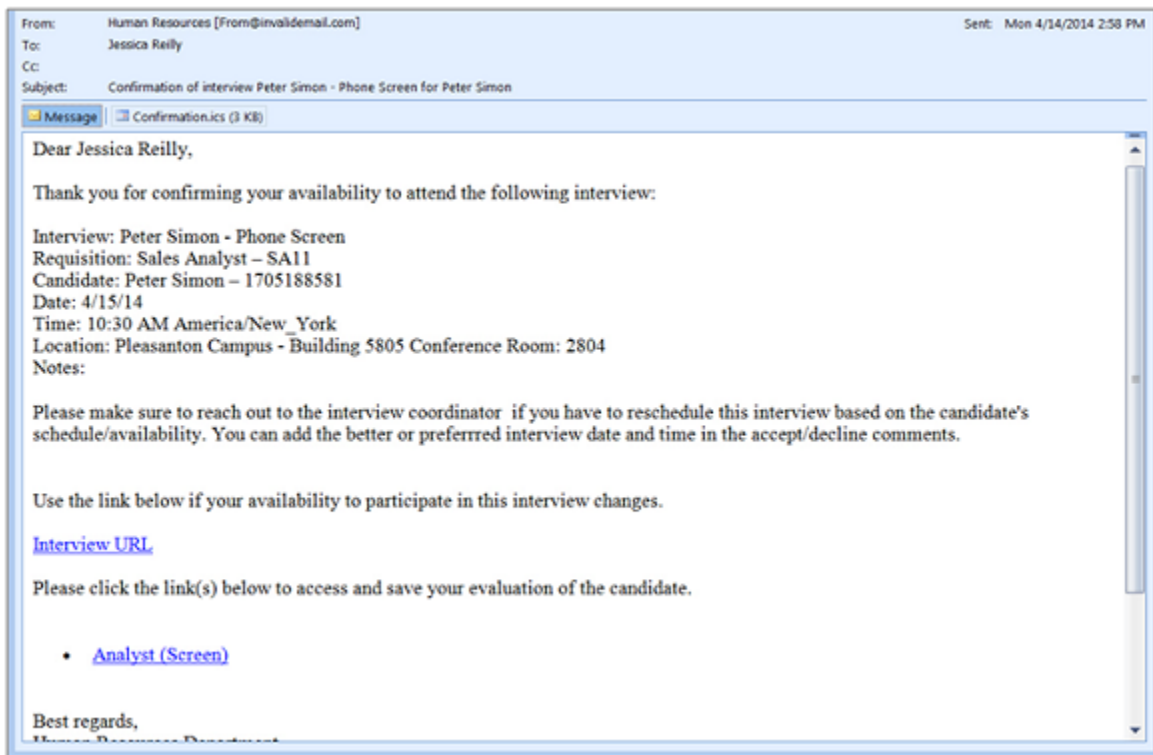
#### Interviewer Response

Accept  
 Decline  
 Request Reschedule

Comments

Upon accepting the interview invitation, participants receive a confirmation email that can contain the following information:

- An .ics attachment for the interview that can be added to their calendar.
- A link to the accept/decline page, in case they need to change their availability.
- Links to any associated evaluations.



## Responding to an Interview Invitation

1. Open the email invitation you received.
2. Click the link included in the email.
3. Provide your availability by selection Accept, Decline or Request Reschedule.
4. In the Comments field, you can provide the interview coordinator with additional details like a better interview date/time or additional participants to include/invite.
5. Click Submit.

Upon accepting the interview invitation, you will receive a confirmation email that can contain the following:

- An .ics attachment for the interview that can be added to your calendar.
- A link to the accept/decline page, in case you need to change your availability.
- Links to any associated evaluations.

## Managing Expired Evaluation Requests

Recruiters can resend expired evaluation requests to participants.

A section called Expired Evaluation Requests is available in the Interviews tab of requisitions and candidate submissions. It displays details of all of the stand-alone and interview related evaluation requests that have expired.

If you have the required permissions, you can renew a request, which will send the evaluator a link to complete the evaluation.

The Expired Evaluation Requests list provides the expiration date, event type, title of questionnaire, name of participant, and status. By default, the list is sorted by expiration date, with the most recently expired evaluation appearing at the top.

Only expired requests can be renewed. Upon selecting a questionnaire and clicking the Renew Request button, you are presented with a pop-up window where you can select an evaluation request message template. The following five message templates are available for selection:

- General
- Initial
- Follow Up
- Final
- Prescreen

When an expired evaluation has been resent, its status is set to Renewed and the expiration date is updated to reflect the new expiration date. The new expiration date is calculated as follows: date of the request + evaluation expiration setting (Configuration > Evaluation Management Administration > [General Configuration] Evaluation Expiration). The evaluation remains in the list until it is completed.

The participant will receive an email message containing a link to complete the previously expired evaluation. The original link to the evaluation, whether stand alone or associated with an interview, will also work upon renewal of the expired request. When the participant has completed the questionnaire, the request will no longer appear in the Expired Evaluation Requests list. The completed evaluation will be visible and available for review in the Completed Evaluation Questionnaires list. If the questionnaire is not completed by the participant, the request will expire on the expiration date, the status will be updated to Expired and you will be able to renew it again if needed.

## Renewing an Expired Evaluation Request

A user type permission grants users access to this feature.

1. In the Requisitions list, click on a requisition.
2. On the requisition, navigate to the Interviews tab or click on a candidate who applied on the requisition and then navigate to the Interviews tab.
3. In the Expired Evaluation Requests section, click Renew Request.
4. Select a message template.
5. Click Save.

The evaluator will receive an email containing a link to complete the previously expired evaluation. When an expired evaluation has been resent, its status is set to Renewed and the expiration date is updated to reflect the new expiration date.



## Evaluation Management - Other Actions

### Duplicating an Evaluation Question

A user type permission grants users access to this feature.

1. In the Libraries menu, select **Evaluation Questions**.
2. Click **Duplicate** next to the desired evaluation question.
3. Complete the fields. See *Evaluation Question Properties*.
4. Click **Save**.

### Duplicating an Evaluation Questionnaire

A user type permission grants users access to this feature.

1. In the Libraries menu, select **Evaluation Questionnaires**.
2. Click **Duplicate** next to the desired evaluation questionnaire.
3. Complete the fields. See *Evaluation Questionnaire Properties*.
4. Click **Save**, or **Save and Preview** to see how the questionnaire will look to evaluators.

### Previewing an Evaluation Questionnaire in a Requisition Template

A user type permission grants users access to this feature.

1. In the Libraries menu, select **Templates**.
2. Open a requisition template.
3. Click the **Interviews** tab.
4. Select an evaluation questionnaire.
5. Click **Preview**.

### Previewing an Evaluation Questionnaire in a Requisition

A user type permission grants users access to this feature.

1. In the Requisitions list, click on a requisition.
2. Click the **Interviews** tab.
3. In the Resources section, select an evaluation questionnaire.
4. Click **Preview**.

## Previewing an Evaluation Questionnaire in a Candidate Submission

A user type permission grants users access to this feature.

1. In the Requisitions list, click on a requisition.
2. Click on a candidate who applied on the requisition.
3. Click the **Interviews** tab.
4. In the **Questionnaires Attached to Requisition** section, select an evaluation questionnaire.
5. Click **Preview** to see the questionnaire.
6. Click **Done** to return to the candidate submission.

## Removing an Evaluation Questionnaire from a Requisition Template

A user type permission grants users access to this feature.

1. In the Libraries menu, select **Templates**.
2. Open a requisition template.
3. Click the **Interviews** tab.
4. Select an evaluation questionnaire.
5. Click **Remove**.

## Removing an Evaluation Questionnaire from a Requisition

A user type permission grants users access to this feature.

1. In the Requisitions list, click on a requisition.
2. Click the **Interviews** tab.
3. In the Resources section, select an evaluation questionnaire.
4. Click **Remove**.

## Removing a Completed Evaluation Questionnaire from a Requisition

A user type permission grants users access to this feature.

1. In the Requisitions list, click on a requisition.
2. Click the **Interviews** tab.
3. In the Completed Evaluation Questionnaires section, select an evaluation questionnaire.
4. Click **Remove**.

## Removing a Completed Evaluation Questionnaire from a Candidate Submission

A user type permission grants users access to this feature.

1. In the Requisitions list, click on a requisition.
2. Click on a candidate who applied on the requisition.
3. Click the **Interviews** tab.
4. In the Completed Evaluation Questionnaires section, select an evaluation questionnaire.
5. Click **Remove**.

## Resending an Evaluation Request

A user type permission grants users access to this feature.

1. In the Requisitions list, click on a requisition.
2. Click on a candidate who applied on the requisition.
3. Click the **Interviews** tab.
4. In the Interviews and Evaluation Requests section, select an evaluation questionnaire.
5. Click **Resend**.

## Canceling an Evaluation Request from a Requisition

A user type permission grants users access to this feature.

1. In the Requisitions list, click on a requisition.
2. Click the **Interviews** tab.
3. In the Interviews and Evaluation Requests section, select an evaluation questionnaire.
4. Click **Cancel**.

## Canceling an Evaluation Request from a Candidate Submission

A user type permission grants users access to this feature.

1. In the Requisitions list, click on a requisition.
2. Click on a candidate who applied on the requisition.
3. Click the **Interviews** tab.
4. In the Interviews and Evaluation Requests section, select an evaluation questionnaire.
5. Click **Cancel**.

## Canceling an Interview from a Requisition

A user type permission grants users access to this feature.

1. In the Requisitions list, click on a requisition.
2. Click the **Interviews** tab.
3. In the Interviews and Evaluation Requests section, select an interview.
4. Click **Cancel**.

## Canceling an Interview from a Candidate Submission

A user type permission grants users access to this feature.

1. In the Requisitions list, click on a requisition.
2. Click on a candidate who applied on the requisition.
3. Click the **Interviews** tab.
4. In the Interviews and Evaluation Requests section, select an interview.
5. Click **Cancel**.

## Adding Columns to View Completed Evaluation Questionnaires and Average Scores

A user type permission grants users access to this feature.

The Questionnaire Average Score and Completed Questionnaires columns must have been defined by the system administrator.

1. In the Candidates list, click the List Format Configuration icon.
2. Select a personal format then click the Edit icon.
3. Select the Questionnaire Average Score and/or Completed Questionnaires columns.
4. Click Save.

In the list format, the name of the columns are: Q'naire Avg Score and Completed Q'naires.

## Evaluation Questionnaires Displayed in a Single Page Format

Whether previewing, viewing or completing an evaluation questionnaire, a consistent, single page layout is used to display information.

When you preview an evaluation questionnaire, whether from within the Evaluation Questionnaires Library, a requisition template, a requisition or a job submission, the questionnaire in preview mode is consistent with the evaluator's view. The following elements are provided in non-editable format:

- Questionnaire title
- Candidate field (displays as a blank field)
- Requisition field (displays as a blank field)
- Evaluator field (displays as a blank field)
- Files Shared label (displays as blank field)
- Documents Shared label (displays as blank field)
- Instructions
- Questions (with all selections left blank) - This is a configurable option
- Skill Ratings (with all selections left blank) - This is a configurable option
- Recommendation field (displays as blank text input field) - This is a configurable option

When you complete an evaluation questionnaire directly from the requisition Interviews tab, the following elements are provided:

- Questionnaire title
- Instructions
- Questions (with the ability to input and save responses)
- Skill Ratings (with all selections left blank) - This is a configurable option
- Recommendation field (displays as blank text input field) - This is a configurable option

When evaluators click the link provided in the feedback request email or the interview confirmation email in order to access and complete an evaluation questionnaire, the following elements are provided:

- Questionnaire title
- Candidate field (displays the candidate name)
- Requisition field (displays the requisition title)
- Evaluator field (displays the evaluator's name)
- Files Shared label (displays links to the candidate files and requisition files)
- Documents Shared label (displays links to shared documents)
- Instructions
- Questions (with the ability to input and save responses)
- Skill Ratings (with all selections left blank) - This is a configurable option
- Recommendation field (displays as blank text input field) - This is a configurable option

When you view completed questionnaires from the requisition Interviews tab, the following elements are provided in a non-editable format:

- Questionnaire title
- Instructions

- Questions (with selected answers displayed)
- Answer weighting and scoring

# 8 Candidate Selection Workflow

## Candidate Selection Workflow

A candidate selection workflow (CSW) provides the framework to move candidates through the hiring process in order to evaluate and find the best candidate for a job.

A CSW includes steps, statuses, and actions a recruiter must go through before hiring a candidate. An analogy can be drawn between the candidate selection workflow and moving candidate resumes from one pile to another as the selection progresses and the number of resumes retained is reduced. For example, a candidate submission is analyzed, the candidate is contacted, interviewed, then selected.



The CSW is created by the system administrator then selected by recruiters when creating a requisition. When candidates apply on the requisition, the selected CSW is used to track and manage candidates from the time they are new to the system to the time that they are hired. Candidate files in each step of the CSW can have a status. Specific actions can be performed on these candidate files depending on the steps and statuses. A set of user type permissions grant users access to the actions that can be performed in a candidate selection workflow.

The CSW can be displayed to recruiters on a priority basis. The system will sort workflows according to the level of compatibility and ensure that the most appropriate workflow is displayed when recruiters create a requisition.

## Candidate Selection Workflow Example

The example illustrates a candidate selection workflow with six steps and several statuses for each of the steps.

These icons represent different status:

- \*: Asterisk represents a completion status.
-  : Shortcut button to change to completion status.
-  : Shortcut button to change to rejected status

New step	HM Review step	Interview / Assessment step	Offer step	Background Check step	Hire step
New Applicant	To be HM Reviewed	To Be Interviewed	Offer to be Made	Initiate Background Screening	Proceed to Hire
Under Consideration	To be Rejected Post HM Reviewed	Invite to Scheduling Center	Draft	Background Follow-Up in Progress	Candidate No-Show (Rescind or Renege Offer)

New step	HM Review step	Interview / Assessment step	Offer step	Background Check step	Hire step
Recommended *	HM Approved *	Phone Screen	Approval in Progress	Background Screening Completed *	Hired *
Rejected	Rejected	1st Interview	Approved	Rejected	Rejected
Has Declined	Has Declined	2nd Interview	Extended	Has Declined	Has Declined
		3rd Interview	Rescinded		
		Interviews Completed *	In Negotiation		
		Rejected	Refused		
		Has Declined	Accepted *		
			Reneged		
			Rejected		
			Has Declined		

## Candidate Selection Workflow Step

Candidate selection workflows are comprised of steps that represent the levels that candidates reach as they progress through the hiring process. A step represents a major stage or event in a candidate selection workflow.

A step in a candidate selection workflow can be mandatory or optional.

- If a step is mandatory, the user must take the candidate through the step before moving on to any subsequent steps. The user will not have access to the subsequent list of steps until the step is completed.
- If a step is optional, the user can skip the step entirely and move the candidate on to the next step. Or, the user can move a candidate conditionally through a step without completing the step in order to move to a subsequent step, and return to the conditional completion step later to complete it.

Most steps are mandatory and sequential, meaning that they must be completed in the prescribed order. In some scenarios, a user may be able to move a candidate to a step without completing the current one, but the system will require that all mandatory steps be completed before completing the hiring of a candidate.

Each step must be finished with a completion status, indicated by an asterisk (\*), before a candidate can move to another step in the hiring process. A completion status completes the step.

A step can have a Restricted confidentiality level. In many organizations, hiring managers are not involved in the earliest steps of the candidate selection process. Recruiters are responsible for evaluating new job applications and only submit



qualified candidates to the hiring managers. It is possible to configure steps to prevent hiring managers from viewing specific selection steps (such as New) in the Recruiting Center Candidates list.

Notifications can be added to steps. This allows sending a message to users to let them know when a step is reached by candidates.

**Note:** There is no limit on the number of steps that can be used in a CSW. However, a best practice is to only add necessary steps.

## Candidate Selection Workflow Status




A status indicates the detail or state of where a candidate is within a step.

A candidate can change status during a step but the candidate can only have one status at a time in each step. Statuses are more flexible than steps as most are optional and do not need to be followed in a certain order. Statuses can be temporary therefore requiring an additional action from the user or they can complete a step (indicated by \*) because they complete the step by either moving the candidate to the next step or terminating the candidate selection process.

Statuses may have different progression levels:

Progression Level	Description
Not Started	Indicates that the step has not started yet. Example: For the 1st Interview step, "To be Scheduled" is a Not Started status because the interview has not been scheduled and the step has not officially started.
In Progress	Indicates that a candidate needs to be moved to other statuses before moving to the next step. The option "move" is not available to the user at this point. Example: For the 1st Interview step, "Scheduled" is an In Progress status.
Completed	Indicates that a candidate can move to the next step. The "move" option is available to the user at this point. When selecting the Completed level, the following option becomes available: "Allow completion even if some activities remain pending". This option allows the move to the next step even if some activities are still pending from a previous step.

Status change buttons (or shortcut buttons) allow recruiters to change the status of a candidate without having to open the Action window. A status can be linked to one of these buttons. Only one status can be assigned to a specific button in the current step.

Button	Behavior in the Candidate File	Behavior in the Candidate List
	Changes the status of the candidate to a completion status.	Changes the status of all selected candidates to a completion status.
	Changes the status of the candidate to Rejected.	Changes the status of all selected candidates to Rejected.
	Changes the status of the candidate to Under consideration.	Changes the status of all selected candidates to Under consideration..

## Action

An action is an event performed on a candidate during the hiring process.

The list of actions displayed in the More Actions list is context-sensitive and the actions that are available vary depending on the selected workflow, the candidate status, and user permissions. For example, Canceled, Deleted, Offer or Hire may not be available to all users. The information displayed in each Action Dialog window is also context sensitive and may vary accordingly.

## Updating Steps and Statuses for Submissions on Different Requisitions

Recruiting Center users can select multiple submissions on different requisitions and update the corresponding step or status.

Recruiting Center users can select several candidate submissions submitted on different requisitions and move them to the next step, bypass the current step, or change the step's status provided all the submissions are at the same step and all the requisitions use the same Candidate Selection Workflow (CSW).

Whichever action users want to perform (move candidate submissions to the next step, change a step's status, or bypass the current step) on multiple submissions, the users require the corresponding user type permission. If users do not have a particular permission, the corresponding action is unavailable for selection.

If users select multiple submissions and some of them do not correspond to the user type permission that governs the action the users want to perform, a message at the end of the updating process indicates which submissions were not updated. Take the case of a user who had a user type that had the Bypass steps: Only if this user is an owner of the requisitions permission. Suppose the user selected multiple candidate submissions on different requisitions and all the submissions were at the 1st Interview step. The user then performed the bypass action to advance the submissions directly to the 3rd Interview step. If the selection included submissions from candidates for whom the user was a collaborator rather than the owner, the system would generate a message listing the submissions that were not updated. The submissions of candidates "owned" by the user would be updated to the 3rd Interview step.

If users change the current step of multiple submissions to Hire and some of the requisitions are then filled, a message is displayed for each filled requisition.

- If there are active offers associated with a filled requisition, the following message is displayed: Once this operation is completed, all openings available for the requisition {Requisition ID} will have been filled. The system will then unpost the requisition. However, you must first rescind all other offers extended to be able to close the requisition.
- If there are no active offers associated with a filled requisition, the following message is displayed: Once this operation is completed, all openings available for the requisition {Requisition ID} will have been filled. If the system is not able to unpost the requisition and change its status to "Filled", the requisition will have to be filled manually and the system will assign a task to {0}. Do you want to hire the selected candidates? If the user answers "No", the action is canceled; none of the submissions selected initially are updated to the Hire step.

While a user is updating the step or status of a selection of submissions on different submissions, the "Send correspondence" check box is available for selection if the individual has a user type that has the following permission and value: Send correspondence (while changing the status of a candidate in a workflow) - Without restriction. If the value is instead Only if this user is an owner of the requisitions or a collaborator, the check box is displayed only if the individual is the owner of or a collaborator for all of the submissions selected.

While a user is updating the step or status of a selection of submissions on different submissions, the workflow Event Date calendar is available for selection provided that all the submissions selected satisfy the Set candidate selection workflow event dates permission for the user type assigned to the user. For example, if the setting value is Only if this user is an owner of the requisitions or a collaborator, the user must be the owner of or a collaborator for all of the submissions or Event Date calendar will not be displayed.

## Bulk Move to the Hire Step/Status

Recruiting Center users can move several candidates to the Hire step/status in a single transaction.

When this feature is activated, users are able to select more than one candidate to move to the Hire step/status. The system performs a verification to see if the number of candidates selected is equal to or less than the number of positions still open. If additional information is required during the hire action, for example the start date, all the information entered will apply to all candidates hired in that action.

This feature supports candidate selection workflows with or without the RSOffer step.

## Sharing Candidates While Moving Them in the Candidate Selection Workflow

When selecting the Change Step/Status action or the Bypass action in the More Actions menu, a Share candidate option is available in the Candidate Selection Workflow assistant window so that users can share a candidate while the candidate is being progressed in the selection workflow.

Recruiters can share candidates with hiring managers when candidates have reached a certain point in the workflow. For example, a hiring manager does not have access to an Oracle Taleo Enterprise Edition product. In order for the hiring manager to review the short list of candidates, the recruiter can share the top candidates with the hiring manager.

**Note:** When the Share candidate and the Send correspondence actions are available in the Candidate Selection Workflow assistant window, both these actions can be used. The Share Candidate assistant will be displayed first, followed by the Send Correspondence assistant.

## Sharing a Candidate in a Selection Workflow

A user type permission grants users access to this feature.









1. Select a candidate file.
2. In the More Actions menu, select Change Step/Status.
3. In the Change Step and Status window, select Share Candidate.
4. Click Save and Continue.
5. Select one or several recipients.
6. Click Next.
7. Select content to share.
8. Click Share and Close.

An email is sent to the recipients with all or part of the selected content of the candidate file.

## Candidate Progression Status

The candidate progression status indicates the most advanced progression status of a candidate on other requisitions across all positions where the candidate is being considered.

To see the progression status of a candidate, the Progression Status column must be added to the candidate list format. Icons are used to indicate the furthest active progression status of a candidate across all positions where the candidate is being considered. When clicking a progression status icon, a tooltip indicates the active status and a date. For example: "Most advanced progression status: New (as of 2011-Oct-17)".

Progression Status Icon	Description
	New
	Reviewed
	First, second, and third interview
	Testing
	Offer
	Hired
	Pipeline
	Contact

In the example below, a candidate has applied to four jobs:

Job	Job Status	Candidate Status
1	Active for sourcing	New > To be reviewed
2	Closed	Interview 2 > To be scheduled
3	Active for sourcing	Offer > Rejected
4	Active for sourcing	Interview 1 > To be scheduled

The icon that would appear for this candidate across all contexts would be Interview 1 icon because it is the furthest active progression status on an active job. Both requisition status and candidate status must be active to be considered for the furthest active progression status.

In the Candidates list, the In Selection Process icon remains available and shows the parallel job applications of the candidate. In a job-specific candidate list, the progression status icon may be displayed while the In Selection Process icon may not be displayed if there is only one job application. In the search result list, if the In Selection Process icon is displayed, the progression status icon is also displayed. If no In Selection Process icon is displayed, the progression status column is empty.

It is recommended to remove the tracking solution (In Selection Process icon) and to replace it with the Progression Status feature in general lists (such as search result lists, folder lists) if you allow users to view the content of requisitions to which a candidate has applied and to which the user has access. In a job-specific candidate list, the In Selection Process icon is visible only when there is at least one concurrent active job application, and the progression status icon is visible as soon as there is one active job application.

## Step/Status Change in One Click

Recruiting Center users can use the Next Action feature to access steps and statuses directly in the candidates list without having to select an action in the More Actions list.

The Next Action column is available in a candidate list format. The Next Action column contains actions that will give access to the next status or step related to a candidate. Actions available in the new column will allow users to:

- Change the status of a candidate to the next completion status (if the step is not already completed).
- Move the candidate to the initial status of the next step if the current step is completed.

Actions available in the Next Action column are Candidate Selection Workflow (CSW) movements only, either a

- Move to the next step in the CSW.
- Change to the completion status within the current step.

If the current status is not a completion status, the action displayed will be a move (change status) to the first completion status of the current step. If the current status is a completion status, then the action will be a move to the next step at the initial status. In a one-step CSW (reference workflow), only statuses configured as a "completion status" will show up as next steps.

## Selecting the Candidate Selection Workflow for a Requisition

The requisition status must be Draft or Open.

Once a requisition has been posted, the candidate selection workflow cannot be edited; you will need to cancel the requisition and duplicate it to be able to make changes.

A user type permission grants users access to this feature.

1. Open a requisition file.
2. In the Requisition tab, click Edit.
3. Click Edit in the Candidate Selection Workflow section.

Depending on the status of the requisition and user type permissions you were granted, available editing functionalities will vary.

4. Click Save and Close.

## Automatically Rejecting Candidate Submissions When Requisitions are Filled and/or Canceled

The auto-rejection of candidate submissions can be set for canceled requisitions and filled requisitions.

System administrators determine when candidate submissions will be automatically rejected:

- When a requisition has been filled.
- When a requisition has been canceled.
- When a requisition has been filled or canceled.
- In neither case.

Recruiters can choose to override the auto-rejection behavior set by the system administrator. In the requisition file Candidate Selection Workflow section, recruiters can select these options: the option Automatically reject all candidate submissions when the requisition is filled or canceled, or in neither case.

- Automatically reject all candidate submissions when the requisition is filled
- Automatically reject all candidate submissions when the requisition is canceled

When viewing the History tab of candidate submissions, recruiters can determine the cause of the auto-rejection. The event "Status changed to Rejected" is displayed for both types of rejections, but the details will indicate if the rejection was due to the requisition being canceled or filled.

# 9 Offer Management

## Offer Process

Recruiting Center users can create offers and approve offers.

The offer process may vary from one company to another. Here is a basic offer process. The recruiter or manager selects the Create Offer action in the More Actions menu when the candidate has reached the Offer step. The offer can be created quickly by selecting a template as a starting point. Such details as the salary information on the requisition or the candidate's current job salary can be included. The offer then gets sent for approval or it can be self-approved if the user has the appropriate permission. The recruiters can set up frequent approvers to make this a fairly easy step in the process. Once approved, the offer is sent to the candidate in writing via email, letter, or electronically. Verbal offers can also be extended and recorded at this time. If the offer is accepted, the recruiter can proceed to any additional CSW steps, confirm the start date and start the onboarding process. If the offer is not accepted, the recruiter has a choice to negotiate new offer terms and do the cycle again or rescind the offer and go back to the workflow.

## Offers and Candidate Selection Workflows

Candidate selection workflows may be configured to contain an Offer step or an RSOffer step.

### Candidate Selection Workflow and Offer step

Using the Offer step is a simplified way to track offer activity in a candidate hiring process without enabling the entire Offer Management module functionality. Placing this step in a workflow will not enable the use of the Offers tab and Offer Approvals tab. A candidate selection workflow containing an Offer step allows users to move candidates from one step to another using standard actions (Change Step/Status, Move, Revert).

When adding the Offer step to a candidate selection workflow, the following actions are available to users via the More Actions list.

- Make an offer.
- Reject candidates.
- Candidate has declined.

### Candidate Selection Workflow and RSOffer step

The RSOffer step is a special candidate selection workflow step created for the Offer Management module. The Offer Management module provides the tools for the creation of offers, offer approval, offer extension to the candidate, and capture of the candidate response. Users are also able to capture competitive offer information as well as candidate current and future expectations.

With this type of workflow, instead of moving candidates using standard actions (Change Step/Status, Move, Revert), specific offer-related actions are presented in the More Actions list as they become an appropriate next activity in the Offer process.

System administrators are responsible for adding the RSOffer step in the appropriate candidate selection workflows. The RSOffer step must be placed before the Hire step. The RSOffer step cannot be customized or edited (except for qualifier groups and qualifiers that can be added to specific statuses).

When adding the RSOffer step to a candidate selection workflow, authorized users are able to:

- Create offers.
- Extend offers verbally, in writing, and electronically.
- Send offers.
- Capture a candidate response.
- Capture a candidate expectations.
- Capture a candidate current job terms.
- Capture competitive offer information.
- Approve offers.
- etc.

## Offer Form

The offer form presents the terms and conditions of a job offer.

The offer form is tied to the *RSOffer step in a candidate selection workflow*.

The offer form, available in the candidate file Offers tab, is where all the information is collected to make an offer. It contains not only the information about the current offer to be made to a candidate but it can also be used to collect and maintain information on the current requisition, previous offers, competitive offers, and current candidate expectations.

In the offer form, each offer appears in a column. When a new offer is created, it automatically appears in the first column to the left and is labeled Offer (New). It is possible to view up to four columns at a time. Users can use the arrows in the top right corner of the center panel to navigate through more offers. Users can also use the drop-down option at the top of each column to change or remove the context being viewed.

In the offer form, users with the appropriate permissions can view details about offers extended to the candidate for other requisitions. On the Job Submission card located on the left panel, users can click links available in the Other Submissions section.

Users can also view attachments and offer letters specific to each offer in the offer form.

## Offer Statuses

An offer can go through different statuses.



Status	Description
Offer to be made	Initial status of the Offer step.
Draft	Offer terms have been started and saved, but not approved. If offer approvals are not required, the offer may be extended at this point.
Cancelled	A draft offer has been created and then cancelled prior to routing for approval or extending to the candidate.
Approval in progress	Offer has been routed for approval.
Approval rejected	Offer approval request has been rejected.
Approved	Offer approval request has been approved and the offer is ready to be extended to the candidate.
Extended	Offer has been extended to the candidate.
Rescinded	After the offer has been extended or the candidate has accepted the offer, the user (company) rescinds/revokes the offer.
In negotiation	Offer was extended to the candidate. The user marked the candidate as wanting to negotiate the offer. If a new offer should be created, the user will need to rescind the offer in order to create a new offer. If a new offer is not required, then either recapture the candidate response (accept or refused) or status them as Rejected or Has Declined.
Refused	Offer was extended to the candidate. The user or the candidate marked the candidate as refusing the offer. A new offer can be created at this point.
Accepted	Offer was accepted by the candidate.
Reneged	After the candidate has accepted the offer, the candidate refuses the offer.
Rejected	After the offer has been rescinded to a candidate, if the user does not wish to create and extend a different offer to the same candidate, the user should status the candidate as Rejected in the Offer step. This will allow an offer to another candidate be created and extended.
Has declined	After the offer has been refused or reneged by the candidate, if the user does not wish to create and extend a different offer to the same candidate, the user should status the candidate as Has Declined in the Offer step. This will allow another offer to be created and extended.

## Offer Actions - CSW and Offer Step

### Making an Offer

Candidate must have reached the Offer step.

Candidate selection workflow must NOT contain the RSOffer step.

1. In the candidate list, open a candidate file.
2. Select Make Offer... in the More Actions list.
3. Complete mandatory information.
4. Select required information.
5. Click Save and Close.

The status is changed to Offer in a workflow that does not include offer management but does include a simple offer step.

## Rejecting a Candidate for a Job

Candidate must have reached the Offer step.

Candidate selection workflow must NOT contain the RSOffer step.

1. In the candidate list, open a candidate file.
2. Select Reject Candidate... in the More Actions list.
3. Select the reason explaining the decision.
4. Enter comments.
5. Click Done.

## Indicating a Candidate Has Declined a Job

Candidate must have reached the Offer step.

Candidate selection workflow must NOT contain the RSOffer step.

1. In the candidate list, open a candidate file.
2. Select Candidates have declined... in the More Actions list.
3. Select the reason explaining why the candidate no longer wants to be considered for the job.
4. Enter comments.
5. Click Done.

## Offer Actions - CSW and RSOffer Step

### Offer Creation

Recruiting Center users can create offers to detail the specific terms and conditions of a job.

Offer creation is tied to the *RSOffer step in a candidate selection workflow*.

To create an offer, users click Create Offer in the More Actions list. To create an offer, users must have been granted the proper user type permissions.

The *offer form* is where all the information is gathered to create an offer. When creating an offer for a candidate, it is possible to use information from another offer, such as the terms of a previous offer, by using the Copy Value icon. This icon appears when hovering the mouse at the top of a column or beside rows or sections of the offer form. By clicking this icon, users can move fields to the new offer all at once or individually. Previous offers are for reference only and cannot be modified. When the offer letter field is copied over, the letter will automatically update to reflect any revised offer terms and the letter will update automatically whenever edits to an offer are made.

In the offer form, users with the appropriate permissions can view details about offers extended to the candidate for other requisitions. On the Job Submission card located on the left panel, users can click links available in the Other Submissions section.

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

Once all required offer fields have been completed, users can submit the offer for approval. Users can review the current offer approval details at any time by going to the candidate file Offer Approvals tab. Approval information is available in the candidate file Offer Approvals tab once an approval path exists.

If users have been granted the appropriate permissions, the Amend Approval Path and Terminate Approval buttons can be available.

Once a job offer has been created for a candidate, offer actions appear in the candidate file More Actions list if the actions are valid given the state of the submission. Offer actions are not possible from the submission list or the general profile.

## Creating an Offer

Candidate must have reached the Offer step.

A user type permission grants users access to this feature.

1. In the candidate list, open a candidate file.
2. Select Create Offer... in the More Actions list.
3. Complete mandatory information.
4. Click Save and Close.

## Extending Offers

Recruiting Center users can extend offers in writing via email or letter, or electronically so that candidates can view and respond to these offers on line, as well as verbally.

The action of extending offers is tied to the *RSOffer step in a candidate selection workflow*.

The offer process starts as soon as an offer is ready to be extended. This can be done when the status is Approved (if an approval cycle is needed) or Draft (if an approval cycle is not needed or is configured to be skipped). In the Extend Offer window, recruiters can select several options:

- *Extend the offer verbally.*
- *Extend the offer via email.*
- *Extend the offer via regular mail or fax.*
- *Extend the offer electronically.*

When extending an offer in writing (via email, regular mail, or fax), users can edit the offer letter after the offer has been approved, regardless of whether the approved offer contained an offer letter or not.

## Extending an Offer Verbally

The offer must have been created.

If offer approvals are required, the offer must be approved.

1. In the candidate list, open a candidate file.
2. Select Extend Offer... in the More Actions list.
3. Select the Extend Verbally option.
4. Click the Calendar icon.
5. Select the current date in the calendar.
6. Capture the candidate response.
7. Click Done.

Verbal delivery of the offer is tracked in the candidate submission.

## Extending an Offer via Email

The offer must have been created.

If offer approvals are required, the offer must be approved.

1. In the candidate list, open a candidate file.
2. Select Extend Offer... in the More Actions list.
3. Select the option Extend in writing.
4. Click Done.
5. Select the email option.
6. Click Next.
7. Click Send.

Written delivery of the offer is tracked in the candidate submission.

When extending an offer in writing, users can edit the offer letter after the offer has been approved, regardless of whether the approved offer contained an offer letter or not.

## Extending an Offer via Regular Mail or Fax

The offer must have been created.

If offer approvals are required, the offer must be approved.

1. In the candidate list, open a candidate file.
2. Select Extend Offer... in the More Actions list.
3. Select the option Extend in writing.
4. Click Done.
5. Select the printed letter option.
6. Click Next.
7. Click Print.

Once printed, the offer can be delivered by regular mail or faxed. Written delivery of the offer is tracked in the candidate submission.

When extending an offer in writing, users can edit the offer letter after the offer has been approved, regardless of whether the approved offer contained an offer letter or not.

## Extending an Offer Electronically (E-Offer)

Recruiting Center users can extend offers electronically so that candidates can view and respond to these offers on line.

Two E-Offer options are available:

- The *standard electronic offer* using Recruiting.
- The *advanced electronic offer* that requires Onboarding (Transitions). There can only be one Advanced E-Offer process in use at a time for each zone.

## Standard Electronic Offer using Recruiting

Customers can use the Standard Electronic Offer feature to extend offers electronically to candidates. Candidates will then access the career section to respond to the offer on line.

To send offers electronically, the Electronic Offers setting must be set to the proper value, users must be granted the permission to extend offers electronically, and the candidate selection workflow must contain the RSOffer step.

The E-Offer process starts as soon as an offer is ready to be extended. Recruiters select the Extend Offer action in candidate submissions with the status Approved (if an approval cycle is needed) or Draft (if an approval cycle is not needed or is configured to be skipped). In the Extend Offer window, the Extend in writing option is selected by default. In the Send Offer Letter window, the E-Offer option is selected by default. When an offer is extended electronically, a tracking event is created in the candidate file History tab indicating that an electronic offer was extended.

Candidates receive an email notification inviting them to access a secure career section portal to view the offer on line. Candidates click the URL link in their email notification, they are directed to the career section portal where they need to log in, they are then directly brought to the Offers tab where they can view the offer details and offer letter attachments, if any. They can also print the offer and the offer letter attachments. Candidates then decide to accept or refuse the offer and they must e-sign the offer by providing their full name and unique identifier. The electronic signature is mandatory but it is not validated and therefore any data can be entered.

**Note:** The Full Name and Unique Identifier labels can be changed by customers.

When candidates accept an offer, the time and date of their e-signature is displayed at the bottom of the accepted offer page, along with the full name of the candidate who signed it. The unique identifier or specific other data which candidates entered is not displayed on the page.

When candidates accept an offer, the offer remains visible in the career section for future reference. When candidates refuse an offer, the offer disappears from the career section. When candidates have multiple concurrent offers, for example a candidate could be hired for a summer job and a long-term permanent position, the career section Offers tab lists all the offers, that is offers that still need a response and offers that were accepted. If an offer has an expiration date and that date is reached and the candidate has not yet responded to the offer on line, the offer disappears from

the career section. If the candidate has accepted the offer before the expiration date, then the accepted offer remains visible in the career section for future reference. If the candidate refuses the offer before the expiration date, then the offer disappears from the career section.

As soon as candidates respond to the offer, recruiters receive an email notification. This notification is a configurable message template which contains the candidate's response. This notification can be modified to provide any other information and can also be sent to additional recipients like the Hiring Manager. Depending on the candidate's response, the candidate status is automatically changed to Offer - Accepted or Offer - Refused, and recruiters can then move the candidate to the next step in the candidate selection workflow.

**Note:** It is not possible to build auto-progression rules that would bring candidates forward in the candidate selection workflow beyond the next step. The email notification sent to recruiters could instruct them to do so manually for each candidate.

Recruiters can capture the offer response on behalf of candidates after they have extended the offer. For example, if a candidate contacts the recruiter to give a response before responding to the offer on line, then the recruiter can capture the response. This can give recruiters the opportunity to capture decline motives or to put the offer into the In Negotiation status. If the response entered by the recruiter is Accepted, then the offer will continue to be displayed in the career section for the candidate to view, just like any accepted electronic offers. The offer will show as being accepted but it will not show the full name of the candidate at the bottom of the offer letter page because the candidate did not enter an electronic signature. If the response entered by the recruiter is Refused, then the offer will disappear from the career section just like when candidates refuse an offer themselves.

It is also possible for recruiters to send an offer again once the offer has been extended. For example, an offer was extended in writing via email or printed letter and the recruiter wants to also send it by E-Offer to make it visible on line in the career section. Similarly, if an offer has already been extended and sent as an E-Offer, recruiters can still send it again via email or printed letter.

**Note:** In standard electronic offers, users can adjust the offer and then extend/send it again. The mere act of adjusting the offer will require that the user rescind the already-accepted offer and create a new offer so that it can be extended again.

## Advanced Electronic Offer using Onboarding (Transitions)

Customers who have more complex electronic offer requirements can configure advanced electronic offer workflows in Onboarding (Transitions) for use in Recruiting.

Some customers might require additional eSignatures, notifications extended to include additional people, calls to partner services, different tasks for executives. Clients like those who have more complex requirements might consider using the "Onboarding (Transitions) version" of electronic offers because offer workflows in this version can be configured to accommodate a wide variety of needs.

To send offers electronically using Onboarding (Transitions), the Electronic Offers setting must be set to the proper value, users must be granted the permission to extend offers electronically, and the Candidate Selection Workflow (CSW) must contain the RSOffer step.

The E-Offer process starts as soon as an offer is ready to be extended. Recruiters select the Extend Offer action in candidate submissions with the status Approved (if an approval cycle is needed) or Draft (if an approval cycle is not needed or is configured to be skipped). In the Extend Offer window, the Extend in writing option is selected by default.

In the Send Offer Letter window, the E-Offer option is selected by default. When an offer is extended electronically, a tracking event is created in the candidate file History tab indicating that an electronic offer was extended.

Candidates may receive an email notification (if the Onboarding (Transitions) process was configured like that) inviting them to access a secure career section portal to view the offer on line. Candidates click the URL link in their email notification, they are directed to the career section portal where they need to log in, they are then directly brought to the Tasks tab where they can view the offer details and offer letter attachments, if any. They can also print the offer and the offer letter attachments. Candidates then decide to accept or refuse the offer and they must complete any mandatory fields which may include an electronic signature.

As soon as candidates respond to the offer, the system task that must be configured into the process will then change the candidate status to Offer - Accepted or Offer - Refused, depending on the candidate's response. This adds a line to the History of the candidate's submission in the Recruiting Center, capturing the candidate's response. Then, recruiters or any other assignees can receive a configurable email notification (if the process is configured like that), which can contain the candidate's response, any e-signature information if desired, and any other data fields. The recruiters can then move the candidate to the next step in the CSW, while the rest of the Onboarding (Transitions) process can also continue automatically in parallel.

It is also possible for recruiters to send an offer again once the offer has been extended. For example, an offer was extended in writing via email or printed letter and the recruiter wants to also send it by E-Offer to make it visible on line in the career section. Similarly, if an offer has already been extended and sent as an E-Offer, recruiters can still send it again via email or printed letter.

As before, recruiters still retain the ability to capture the offer response on behalf of candidates after they have extended the E-offer, and before the candidates respond to it online themselves. This changes the status in the CSW to Offer - Accepted or Offer - Refused, depending on the candidate's captured response. Capturing this response in the Recruiting Center has no immediate effect on the offer letter that is still displayed to the candidate in the Career Section. However, the candidate's electronic response will not change the CSW status because the offer response was already inputted by the recruiter, and the offer is no longer in the Extended status. The offer letter will continue to be displayed in the Tasks tab as long as the process is running.

Just as recruiters can track any process, they can also track the progression of the E-Offer process in the Onboarding (Transitions) Center. They can also view their current tasks regarding an E-Offer process in the Onboarding (Transitions) Center. Recruiters might receive an email notification (if such notification is configured) as soon as candidates respond to an advanced E-Offer.

## Comparison of the Standard Electronic Offer and the Advanced Electronic Offer

	Standard Electronic Offer	Advanced Electronic Offer
Where do offers appear in the career section?	In the Offers tab. Several offers can appear in the tab.	In the Tasks tab. Several Onboarding (Transitions) processes can appear in the tab.
When is the candidate invited?	When the offer is sent by the Recruiting Center user, either at the moment the offer gets extended or when an extended offer is sent again.	Whenever, as configured within the E-Offer process.

	Standard Electronic Offer	Advanced Electronic Offer
Is the e-signature mandatory?	Yes.	It is configurable.
Is it possible to capture several e-signatures?	Two e-signatures on a single form for candidate.	Unlimited different e-signatures can be configured to appear on any number of forms assigned to any participants.
Is it possible to validate the e-signature?	No, the two e-signatures are not validated but they are mandatory.	Yes, by specifying the electronic signature method (first name, last name, birth date, SSN last 4 digits, etc.).
Is it possible to send different notifications or tasks per OLF?	No	Yes, by configuring different steps, targeted per OLF or per any field, within the E-Offer process. Only one Onboarding (Transitions) process of type "E-Offer" can be created (not several based on OLF).
Is it possible to send reminders?	No	Yes, for the candidate E-Offer form and for any task as it approaches or passes its due date.
When is the status updated in the candidate selection workflow?	Immediately when the electronic offer is submitted by the candidate on the career section.	Whenever desired within the E-Offer process, at the point when the system task gets triggered for this purpose.
Can recruiters capture the offer response manually?	Yes, the candidate selection workflow gets updated but the candidate can no longer e-sign the offer in the career section. The candidate will still see the accepted offers in the career section.	Yes, the candidate selection workflow gets updated and the process can continue. The candidate can still e-sign the offer. However, if the candidate's response is different, the response that was first captured by the recruiter will be considered.
Is it possible to configure auto-progression of the candidate selection workflow, after receiving candidate response to an E-Offer?	No	No
Do offers remain available in the career section when candidates refuse it?	No	Yes, all submitted forms including the E-Offer form remain visible in read-only for the duration of the E-Offer process, until the candidate/new hire process reaches 100% completion (or gets cancelled or suspended).
Do offers remain available in the career section after candidates accept them?	Yes, the offer remains visible until the candidate/offer information gets archived or purged.	Yes, all submitted forms including the E-Offer form remain visible in read-only for the duration of the E-Offer process, until the



	Standard Electronic Offer	Advanced Electronic Offer
		candidate/new hire process reaches 100% completion (or gets cancelled or suspended).
If the candidate accepts the E-Offer while the start date is still tentative, will the system automatically create a task telling the recruiter to finalize it?	No	No
When the candidate accepts the E-Offer, will the system automatically create a task telling the recruiter to confirm the employee's presence on their start date?	No	No
Can recruiters rescind an electronic offer?	Yes, an electronic offer can be rescinded just like any other offer in the Extended status.	Yes, an electronic offer can be rescinded just like any other offer in the Extended status.
What happens when recruiters cancel a requisition containing an electronic offer?	The requisition cannot be cancelled until any extended offers have first been rescinded.	The requisition cannot be cancelled until any extended offers have first been rescinded.
What happens when the expiration date is reached?	Candidates can no longer respond to the electronic offer, but recruiters can still respond for them.	No effect, the process can continue.
What happens when recruiters mark an electronic offer as being accepted before the candidates give their own response on the career section?	The candidate selection workflow gets updated (status is Accepted) but the candidate can no longer e-sign the offer in the career section. No e-signature will be visible at the bottom of the accepted offer on the career section because the candidate did not e-sign it. The candidate will still see the accepted offer in the career section.	No effect; the process can continue. The candidate selection workflow gets updated (status is Accepted) and the process can continue. The candidate can still e-sign the offer. However, if the candidate's response is different, the response that was first captured by the recruiter will be considered.
What happens when recruiters mark an electronic offer as being refused before the candidates give their own response on the career section?	The candidate selection workflow gets updated (status is Refused) and the electronic offer disappears from the career section.	No effect; the process can continue and the candidate selection workflow gets updated by the recruiter to status Refused. The candidate can still e-sign the offer. However, if the candidate's response is different, the response that was first captured by the recruiter will be considered.
What happens when recruiters mark an electronic offer as being in negotiation?	No effect. The status of the offer is changed and a row is written into History as usual, but the candidate can still view and respond to the E-Offer as usual.	No effect. The status of the offer is changed and a row is written into History as usual, but the candidate can still view and respond to the E-Offer as usual.

## Extending an Offer Electronically

The Electronic Offer feature must be enabled.

The offer must have been created and approved.

The candidate submission must be in the status Approved (if an approval cycle is needed) or Draft (if an approval cycle is not needed or is configured to be skipped).

1. Open a candidate submission.
2. In the More Actions list, select Extend Offer.
3. In the Extend Offer window, the Extend in writing option is selected by default. Click Next.
4. In the Send Offer Letter window, the E-Offer option is selected by default. Click Next.
5. Click Send.

When an offer is extended electronically, a tracking event is created in the candidate file History tab indicating that an electronic offer was extended.

## Sending an Offer

Offer must have been extended to the candidate.

1. In the candidate list, open a candidate file.
2. Select Send Offer... from the More Actions list.
3. Complete mandatory fields.
4. Select required information.
5. Click Next.
6. Click Send.

The offer previously communicated is sent to the candidate with the selected medium.

## Capturing the Candidate Response

Offer must have been extended to candidate.

1. In the candidate list, open a candidate file.
2. Select Capture Response... in the More Actions list.
3. Select the response the candidate has made to the offer.
4. Click Next.
5. Complete required information according to the response given by candidate.
6. Click Done.

The response to an offer made to a candidate is entered in the candidate file.

## Editing an Offer

Candidate must have reached the Offer step.

Offer must be created but not approved or extended.

1. In the candidate list, open a candidate file.
2. Select the Offers tab.
3. Click Edit under an offer.
4. Edit information.
5. Click Save and Close.

## Cancelling an Offer

Candidate must have reached the Offer step.

The offer was created but not extended to the candidate.

The action to cancel an offer is not possible while an approval process is underway. If an approval is underway, available actions are Amend Approval, Decide on Approval, or Terminate Approval Path. Cancelling an offer is only possible for draft offers or approved offers.

1. In the candidate list, select a candidate file.
2. Select Cancel Offer... in the More Actions list.
3. Add a comment.
4. Click Done.

The offer is no longer active, and the candidate status is updated to Offer Cancelled.

## Cancelling an Accepted Offer

The offer must have been extended to the candidate.

A user type permission grants users access to this feature.

1. In the candidate list, open a candidate file.
2. Select Rescind Offer... in the More Actions list.
3. Add a comment.
4. Click Done.

The offer is canceled although it was sent to the candidate.

## Indicating a Candidate has Declined an Accepted Offer

The offer must have been extended to the candidate.

A user type permission grants users access to this feature.

1. In the candidate list, open a candidate file.
2. Select Renege Offer... in the More Actions list.
3. Add a comment.
4. Click Done.

The candidate file indicates that the candidate has declined an offer previously accepted.

## Updating the Offer Expiration Date

An offer must be created.

A user type permission grants users access to this feature.

1. In the candidate list, open a candidate file.
2. Select Update Expiration Date... in the More Actions list.
3. Select a new expiration date.
4. Click Done.

The date before which the candidate must respond to an offer is changed.

## Specifying if the Offer Start Date is Tentative

The candidate must be at the Offer step.

1. In the candidate list, open a candidate file.
2. Click the Offer tab.
3. In the More Actions list, select Create Offer.
4. Under the start date section, select or not the Tentative option.
5. Click Save.

The offer form now indicates if the start date is tentative or not.

## Updating the Offer Start Date

An offer must be created.

A user type permission grants users access to this feature.

1. In the candidate list, open a candidate file.
2. Select Update Start Date... in the More Actions list.
3. Select a new starting date.
4. Click Done.

The starting date on which the candidate is required to start working is changed in the offer.

## Using the Salary Calculator

1. In the candidate list, open a candidate file.
2. Select the Offers tab.
3. Click Edit in a column.
4. Click the Calculator icon.
5. Complete fields as required.
6. Click Done.

Salary related values generated by the calculator are automatically included in the file.

## Viewing E-Offer Letter PDFs

Recruiting Center users can view and print offer letter PDFs that are electronically accepted or refused by the candidate or employee

This feature is available for both the standard E-Offer in Recruiting and the advanced E-Offer in Onboarding (Transitions). For details, on the advanced E-Offer, refer to the Onboarding (Transitions) documentation.

Recruiters can use the *Standard Electronic Offer* feature in Recruiting to extend offers electronically to candidates. Once the offer is extended to the candidate, the candidate accesses the career section Offers tab to respond to the offer online. Depending on the candidate's response, the candidate status is automatically changed to Offer - Accepted or Offer - Refused, and the recruiter can then move the candidate to the next step in the candidate selection workflow. The recruiter, if granted the proper permissions, can view and print the PDF of the completed E-Offer letter in:

- the candidate file History tab, by clicking the hyperlinked name of the offer letter template shown in the Details column.
- the offer grid for the current offer, by clicking the Print icon.

**Note:** The Print icon is available only for the current offer. In the case where the offer is no longer current, the icon is not available. If the offer was rescinded by the Recruiting Center user or renegeed by the candidate, the offer grid will no longer display the icon to access the completed offer letter. However, the entry in the History tab will always remain available to access all past E-Offer PDFs, even those rescinded or renegeed.

Date	Events	Language	Details	Comments	By
<b>UN10000111 (JKH Req with work location)</b>					
14.02.25 11:33 PM	Offer 3 – E-Offer notification sent to	en			System
14.02.25 11:33 PM	Offer 3 – E-Offer accepted by candidate	en		<a href="#">Signed Offer Letter Accepted: Offer Letter Short</a>	Candidate
14.02.25 11:33 PM	Offer 3 – Accepted	en	Event Date: 14.02.25 11:33:01 PM		Candidate

The E-signature information is displayed at the end of each E-Offer letter PDF:

- Acceptance or refusal of the offer.
- Time and date of the candidate e-signature (in the timezone of the recruiter who extended the offer).
- IP address.
- Full name of the candidate who signed the E-Offer.

**Note:** Recruiters can view accepted and refused offers that were electronically signed in version 12C and beyond. The candidate file History tab displays a clickable link to view the PDF of these E-Offers.

## Other Offer Actions

### Capturing Candidate Expectations

Candidate expectations can be captured throughout the selection process, but most likely during an interview.

A user type permission grants users access to this feature.

1. In the candidate list, open a candidate file.
2. Select Capture Expectations... in the More Actions list.
3. Select the type of expectation.
4. Click Create.
5. In the Desires (New) column, complete information.
6. Click Save and Close.

### Editing Candidate Expectations

Candidate expectations must be included in file.

A user type permission grants users access to this feature.

1. In the candidate list, open a candidate file.
2. Select the Offers tab.
3. Click Edit in the expectations column.
4. Change information.
5. Click Save and Close.

## Capturing Candidate Current Conditions

Users can capture candidate job terms for comparison purposes before a formal offer is made. Candidate current job terms can be captured throughout the selection process, but most likely during an interview.

A user type permission grants users access to this feature.

1. In the candidate list, open a candidate file.
2. Select Capture Expectations... from the More Actions list.
3. Select Current Job.
4. Click Create.
5. In the current Job (New) column, complete information.
6. Click Save and Close.

## Editing Candidate Current Conditions

A user type permission grants users access to this feature.

1. In the candidate list, open a candidate file.
2. Select the Offers tab.
3. Click Edit next to Current Job column.
4. Make changes.
5. Click Save and Close.

## Capturing Competitive Offer Information

Competitive offer information can be entered in the offer form throughout the selection process, during interviews or telephone conversations.

A user type permission grants users access to this feature.

1. In the candidate list, open a candidate file.
2. Select Capture Competitive... in the More Actions list.
3. In the Competitive Offer (New) column, complete information.
4. Click Save and Close.

## Editing Competitive Offer Information

Competitive offer must be captured.

A user type permission grants user access to this feature.

1. In the candidate list, open a candidate file.
2. Select Capture Competitive...from the More Actions list.
3. Click Edit under the Competitive Offer column.
4. Complete the information.
5. Click Save and Close.

## Adding an Attachment to an Offer

A user type permission grants users access to this feature.

The file will be scanned for viruses. If a virus is detected, the file is not attached. The system displays file information or suggests attaching a different file.

1. In the candidate file, click the Add Attachment icon.
2. Select Offer in the Attach to option.
3. Browse to select a file.
4. Click Done.

The name of the attached file is displayed in the Attachments list under the Attachments tab of the candidate file.

## Removing an Attachment from an Offer

A user type permission grants users access to this feature.

Candidate file must have a file attached to an offer.

1. In the candidate file, click on the Attachments tab.
2. Move your mouse over the name of the file to remove.
3. Click the Remove icon.
4. In the warning window, confirm deletion.

The file no longer appears in the list of attachments.

## Offer Approval

### Requesting the Approval of Offers

Recruiting Center users can request the approval of offers.

Users with the appropriate permission can route offers for approval by selecting the **Request Approval** action in the More Actions list. This option is used when at least one person must approve an offer before extending it. See *Requesting the Approval of an Offer*.



When requesting the approval, users must choose from a list the people who will be required to do the approval. The list of approvers can be configured or not by the system administrator depending on the type of approval chosen by the organization.

- If the standard approval process is used, users will select approvers from a list containing all of the active users of the database. Users will also be able to create a list of *frequent approvers* in the My Setup feature.
- If Dynamic Approval Routing process is used, the list of approvers will be pre-populated upon selecting the Request Approval action. The list of approvers to be generated is configured by the system administrator within the Dynamic Approval Routing feature. These approvers are displayed based on the configured rules and conditions.

Selected approvers will approve offers using one of these methods:

- If the approvers are Recruiting Center users, they will receive an *Approve Offer* task in the Tasks channel.
- If the approvers are not Recruiting Center users (Note: They must still be created as users in the Oracle Taleo Enterprise Edition, with valid credentials), they will receive an eShare message via email.
- If the approvers are both Recruiting Center users and eShare users, they will receive an Approve Offer task in the Tasks channel as well as a message via email.

When conducting the approval from either the Tasks list or from eShare, approvers will receive a PDF print version of the offer to review (rather than the actual file being visible in the system). Also, approval files are generated according to the user's permissions to view fields having specific security levels.

The approval path can be carried out in two ways:

- **Sequential:** When the first approver receives an approval request, the approver approves the offer. Once approved, the approval request goes to the next approver, and so on. The offer does not move forward until each approver in the sequence has approved in order. If one person in the sequence rejects the offer, then the approval process ends.
- **Parallel:** Multiple approvers receive an approval request and they can all approve the offer at the same time. Approvers can approve the offer without having to wait for the others.

If the standard approval process is used within an organization, the system administrator must activate settings to enable sequential or parallel approval. If the Dynamic Approval Routing is used within an organization, approval will be sequential unless there are more than one approver for the same role, then approval will be parallel.

## Requesting an Offer Approval

A user type permission grants users access to this feature.

Candidate must have reached the Offer step.

Offer must be created.

1. In the candidate list, select a candidate file.
2. Select Request Approval... in the More Actions list.
3. Select the approvers. Use Quick Filters to filter the list down to relevant information.
4. Define the sequence of approval by assigning a sequence number using the drop-down list under the Order column.

When the first approver receives an approval request, the approver approves the offer. Once approved, the approval request goes to the next approver, and so on.

5. In the After Approval section, select a user to whom you will assign the next task.
6. Enter comments.
7. Complete other necessary fields.

Important information regarding the field Add the approvers to the list of my frequent collaborators. This function will only add these users as frequent collaborators under My Setup > Preferences. It will not add these users as collaborators on the requisition currently open. Users will need to log out and log back in to see the change applied to their list of frequent collaborators under My Setup > Preferences.

As of Feature Pack 11A.4, the "Notify me once this task is complete" checkbox has been removed from the Request Approval window for requisitions because this option did not have any purpose. Notifications about the progress of approvals can be configured by system administrators if desired.

8. Click Done.

The system assigns the task to the first approver in the sequence.

- If the approver is a Recruiting Center user, an Approve Offer task is assigned to the user.
- If the approver is an eShare user, the approver receives an eShare approver message.

## Methods to Approve Offers

Approvers can approve offers via different tools.

### Using the Tasks Channel

If the approver is a Recruiting Center user, the approver will receive an Approve Offer task in the Tasks channel. See [Approving an Offer via the Tasks Channel](#).

### Using eShare

If the approver is not a Recruiting Center user, the approver will receive an eShare message via email.

### Using the Tasks Channel and/or eShare

If the approver is both a Recruiting Center user and an eShare user, the approver will receive an Approve Offer task in the Tasks channel as well as a message via email.

When conducting the approval from either the Tasks list or from eShare, approvers will receive a PDF print version of the offer to review (rather than the actual file being visible in the system). Also, approval files are generated according to the user's permissions to view fields having specific security levels.

### Approving an Offer on Behalf of Another Approver

From time to time, it may be necessary to approve an offer on behalf of another approver. This is done by using the action called Amend Approval Path. Users with the appropriate permissions can update an approval decision manually on behalf of one of the approvers. See [Approving an Offer on Behalf of Another Approver](#).

## Approving an Offer

A user type permission grants users access to this feature

1. In the Tasks channel, click Approve Offer.
2. In the Tasks list, click Approve Offer next to the desired requisition.
3. In the Decide on Approval window, select Approve.
4. Enter comments if mandatory.
5. Click Done.

## Approving an Offer on Behalf of Another Approver

A user type permission grants users access to this feature.

Candidate must have reached the offer step.

Approval for offer must have been requested.

1. In the candidate list, click on a candidate file.
2. Select Amend Approval Path in the More Actions list.
3. Select Approve from the Decision drop-down menu.
4. Complete mandatory fields.
5. Click Done.

## Offer Approval Path Amendment

From time to time, it may be necessary to change the approvers that were originally selected for an offer. This is done by using the action called **Amend Approval Path**.

The Amend Approval Path action allows users to modify an existing offer approval path. Users, if they have the permission, can add or remove approvers, reorder them, and even decide for them.

The Amend Approval Path action is available in the More Actions menu only if:

- the offer status is set to "Approval in Progress";
- the user has the permission "View and Manage Offers".
- the user has the permission "Amend an Approval Path".

### Adding Approvers

It is possible to add approvers to an existing approval path. When clicking the Add Approvers button located at the bottom of the Amend Approval window, a window appears and users can filter and select one or many approvers. The newly added approvers appear at the top section of the window with the other approvers.

### Removing Approvers

It is possible to remove approvers from an existing approval path. When clicking the Remove icon next to the approver's name, the approver is removed from the approval path.

To remove an approver, the user must have the permission "Edit approvers when requesting approvals".

Specific rules apply when removing approvers:

- A user can remove approvers from an approval path only if the approvers have not yet received the Approve Offer task.
- A user cannot remove an approver from an approval path if the approver has already rendered a decision.

### Reordering Approvers

It is possible to reorder approvers in an existing approval path.

To reorder approvers, the user must have the permission "Edit approvers when requesting approvals".

Specific rules apply when reordering approvers:

- A user can change the order of the approvers only if the approvers have not yet received the Approve Offer task.
- A user can change the order of the approvers only if the approvers have not yet rendered their decision.

### Deciding for Approvers

It is possible to take an approval decision for an approver.

Specific rules apply when deciding for approvers:

- A user can decide for an approver only if the approver has not yet rendered a decision.
- A user can decide for an approver even if the approver has already received the Approve Offer task.
- A user can decide for an approver if the user has the permission "Decide for other approvers".
- A user cannot set the decision to Pass for the last approver if all other approvers have also set their decision to Pass.

### Assigning the Task After the Approval

It is possible to change the person who will perform the next task once the approval has been rendered. This is done using the selector next to the **Assign the next task to** field.

The screenshot shows a web interface for 'Amend Approval'. It has a header 'Amend Approval' and a section titled 'Message Details' containing the following information: 'From: Team Support', 'Date: Jan 27, 2015, 12:51:48 PM', 'Comments: vdsvd', and 'For Offer: Offer 1 (Current)'. Below this is a section titled 'After Approval' which is highlighted with a red border. It contains a red asterisk icon followed by the text 'Assign the next task to' and a text input field containing 'Support, Team' with a dropdown arrow icon to its right.

### Adding Approvers to the List of Collaborators

When the option "Add the approvers to the list of collaborators defined for this requisition" is selected, the selected approvers will be automatically added to the requisition's collaborators list. This option is visible if:

- the Collaborators list has been enabled for the requisition;
- the user adding the approvers is the owner of the requisition (Recruiter, Recruiter Assistant, Hiring Manager, Hiring Manager Assistant). If the user is not the owner of the requisition, he must have the permission "Reassign requisitions to owners and collaborators if the user is not an owner".

When the option "Add the approvers to the list of my frequent collaborators" is selected, the selected approvers will automatically be added to the user's frequent collaborators list (available under My Setup > Preferences). It will not add the approvers in the collaborator's list of the requisition. This option is visible only if the Collaborators list has been enabled for the requisition.

## Terminating the Offer Approval Process

A user type permission grants users access to this feature.

Approval must have been requested for the offer.

Offer must not have been extended to the candidate.

1. In the candidate list, click on a candidate file.
2. Select Terminate Approval Process... in the More Actions list.
3. Enter comments.
4. Click Done.

## Resending an Offer Approval Request

This feature is only relevant to use if approvers are eShare users and are therefore receiving email based task requests.

A user type permission grants users access to this feature.

1. In a requisition file, click on the Offer Approvals tab.
2. Click Send Reminder.

An offer approval request reminder is sent to the currently assigned eShare approver.

## Offer Approval Acknowledgment with eShare

eShare users can receive a confirmation of their offer approvals.

This feature is automatically available on all eShare approvals. When users respond to an eShare approval request, there is a check box to trigger the receiving of an approval acknowledgment. If users choose to receive the acknowledgment, upon completing their decision on the request, the users will receive an email message confirming their action.

Three system message templates have been created for this purpose. There is a standard message available and if desired, system administrators can modify the text of the message sent. The acknowledgment sent will depend on the decision of the approver:

- Offer Approved Acknowledgment
- Offer Rejected Acknowledgment
- Offer Passed Acknowledgment

Approvals decided via the Tasks channel do not have an acknowledgment option; users can view their completed tasks in the Tasks channel by clearing the *Hide completed tasks* option.

## Offer Approval Request Reminder

Recruiting Center users can send an offer approval request reminder.

Users with the appropriate permissions can click the Send Reminder button on the Approvals tab within the offer when an active approval is pending. This action will resend the approval request email to the approvers who it is the turn to render their decisions. If the approver is an eShare user, the eShare hyperlink will be present in the email.

## Approver

An approver is a Recruiting Center user who will approve requisitions and/or offers.

A list of approvers can be defined by the system administrator at the department level. A list of personal default approvers, called frequent approvers, can also be defined by the Recruiting Center user in the My Setup feature. When

a requisition and/or offer is ready to be approved (by selecting the Request Approval action), the approval path is selected by default as follows:

- If frequent approvers were defined under My Setup, these approvers will be automatically selected.
- If frequent approvers were not defined under My Setup, the approvers set at the department level by the system administrator will be selected automatically.

When a user selects approvers, the selector only displays users who can be potential approvers. It is possible that no approvers are displayed if none of them are allowed to do the approval. An approver must be an active user and have the user type permission to approve requisitions and/or offers.

## Creating a List of Frequent Approvers

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

1. In the auxiliary navigation bar, click Resources, then My Setup.
2. In the Frequent Approvers tab, click Add...
3. Select one or several approvers.
4. Click Done.

The approvers appear in the Approvers list. These approvers will be automatically selected when requesting the approval of a requisition and/or offer overwriting the default approvers set by the system administrator.

## Modifying the List of Frequent Approvers

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

1. In the auxiliary navigation bar, click Resources, then My Setup.
2. In the Frequent Approvers tab, click Modify...
3. Select one or several approvers.
4. Click Select.
5. Click Done.

The approvers appear in the Approvers list. These approvers will be automatically selected when requesting the approval of a requisition or offer overwriting the default approvers set by the system administrator. The system cannot modify the approver list a user has set under My Setup.

## Adding an Approver to the Frequent Approvers List

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

1. In the auxiliary navigation bar, click Resources, then My Setup.

2. In the Frequent Approvers tab, click Add...
3. Select one or several approvers.
4. Click Done.

The approvers appear in the Approvers list. These approvers will be automatically selected when requesting the approval of a requisition and/or offer. The system cannot modify the approver list a user has set under My Setup.

## Removing an Approver from the Frequent Approvers List

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

1. In the auxiliary navigation bar, click Resources, then My Setup.
2. In the Frequent Approvers tab, click Modify...
3. Hover your mouse on the name of an approver.
4. Click on the Remove icon.
5. Click Done.

The approver no longer appears in the Approvers list under My Setup.



# 10 Onboarding (Transitions) Processes in the Recruiting Center

## Onboarding (Transitions) Processes in the Recruiting Center

Onboarding (Transitions), a "new generation" onboarding product, provides a unified, automated and customizable system for transitioning candidates and employees. Onboarding (Transitions) processes can be started in the Recruiting Center and several elements and actions have been added to the Recruiting Center to integrate with Onboarding (Transitions).

Processes are created in Onboarding (Transitions). A process is a series of steps typically performed by multiple stakeholders. All necessary steps must be completed before the process acquires the "Complete" status. Depending on the type of process, a process can be started from the Recruiting Center or using Taleo Connect or Web Services.

There are four types of Onboarding (Transitions) processes. The first three types can be started in the Recruiting Center.

- *Pre-Hire*
- *New Hire*
- *E-Offer*
- *Offboarding*

### Viewing Onboarding (Transitions) Processes via Channels

The Recruiting Center center stage provides two channels to view Onboarding (Transitions) processes:

- Pre-Hire channel
- New Hire channel

Another channel called Onboarding (Transitions) provides links to access processes in the Onboarding (Transitions) Center.

The Tasks channel contains links to the user's Onboarding (Transitions) tasks that are due today, are overdue, or whose status is "In Progress".

### Actions in the Recruiting Center that Affect Onboarding (Transitions) Processes

These actions performed by Recruiting Center users affect running Onboarding (Transitions).

- **Rescind Offer:** If an Onboarding (Transitions) E-Offer process is currently running, an offer was extended, and a user selects the Rescind Offer action, this will cancel the E-Offer process and the offer status will be Rescinded. For any other type of Onboarding (Transitions) process currently running, there is no effect, the process continues.

- **Capture Response:** If a user accepts or refuse an offer that was extended, there is no effect on a running Onboarding (Transitions) E-Offer process; the process still continues. For any other type of Onboarding (Transitions) process currently running, there is no effect, the process continues.
- **Reject Candidate:** If a user rejects a candidate, there is no effect on a running Onboarding (Transitions) E-Offer process; the process still continues. For any other type of Onboarding (Transitions) process currently running, there is no effect, the process continues.
- **Revert, Bypass, Change Step/Status:** If a candidate has an offer with the status Extended, the Revert, Bypass and Change Step/Status actions are not supported. For any other type of Onboarding (Transitions) process currently running, including an E-Offer process, there is no effect; the process continues.

## Pre-Hire and New Hire Processes

Candidate Selection Workflows can be configured such that users who have the necessary permissions can start or cancel Onboarding (Transitions) prehire and new hire processes from the Recruiting Center for candidates on requisitions.

When candidates reach a step and status (in a Candidate Selection Workflow) configured for Onboarding (Transitions) processes, the following actions become available for selection in the More Actions list:

- Start Onboarding (Transitions) Pre-Hire Process
- Cancel Onboarding (Transitions) Pre-Hire Process
- Start Onboarding (Transitions) New Hire Process
- Cancel Onboarding (Transitions) New Hire Process

These types of Onboarding (Transitions) process can be launched from any step of a Candidate Selection Workflow provided the step was configured for these actions and the Recruiting Center users have the required user type permissions.

When an Onboarding (Transitions) process is started, the event is recorded on the History tab of the candidate file. No event is recorded on the History tab, however, when a process is completed, suspended and resumed, or canceled.

These processes can also be started or canceled using Taleo Connect.

### Starting Onboarding (Transitions) Process and Impact on SmartOrg User Accounts

Before starting an Onboarding (Transitions) process for a candidate, it is important that Recruiting Center users ensure there is only one candidate record for the person. Performing a check for duplicates (More Actions list > Check for Duplicates) enables Recruiting Center users to determine if a candidate created multiple candidate profiles. If more than one candidate record is found for the person, Recruiting Center users are strongly encouraged to perform the Merge Candidate Files action before starting an Onboarding (Transitions) process.

Starting an Onboarding (Transitions) process for a candidate results in the creation of a user account in SmartOrg (assuming the candidate record is not already linked to a user account). Each person should have a single candidate record and it should be linked to a single SmartOrg user account.

Suppose a candidate is hired using candidate record "A" and an Onboarding (Transitions) process is started. This action results in the creation of a linked user account "A" in SmartOrg. Suppose the person later creates a second candidate record "B" at the external career site and applies for a different job in the organization. If a Recruiting Center user does not perform the Check for Duplicates action and starts an Onboarding (Transitions) process, an unnecessary user

account "B" is created in SmartOrg. These two conflicting user accounts can easily become problematic for integrations, Learn accounts and single-sign-on configurations.

In addition, the two user accounts cannot be merged and even the two candidate records cannot be merged because each is associated with a distinct Onboarding (Transitions) process. (Please see Automatically Deleting Old Onboarding (Transitions) Processes). Such problematic situations can be avoided if Recruiting Center users perform the Check for Duplicates action and merge candidate records that refer to the same person before starting an Onboarding (Transitions) process.

## Starting an Onboarding (Transitions) Pre-Hire Process

1. In the Candidates list, select a candidate.
2. In the More Actions list, select Start Onboarding (Transitions) Pre-Hire Process.
3. Select a process.
4. Click Done.

## Starting an Onboarding (Transitions) New Hire Process

1. In the Candidates list, select a candidate.
2. In the More Actions list, select Start Onboarding (Transitions) New Hire Process.
3. Select a process.
4. Click Done.

## Canceling an Onboarding (Transitions) Pre-Hire Process

1. In the Candidates list, select a candidate.
2. In the More Actions list, select Cancel Onboarding (Transitions) Pre-Hire Process.
3. Click Done.

## Canceling an Onboarding (Transitions) New Hire Process

1. In the Candidates list, select a candidate.
2. In the More Actions list, select Cancel Onboarding (Transitions) New Hire Process.
3. Click Done.

## E-Offer Processes

In the Recruiting Center, two E-Offer processes are available if system administrators have configured them.

The standard E-Offer process simply allows candidates to accept or refuse offers. The advanced E-Offer process, which requires the Onboarding (Transitions) product, allows candidates to accept or refuse offers, and provides additional tasks, forms, electronic signatures, etc. Provided all the right settings and permissions have been configured, the E-Offer process can be started from the Recruiting Center when an offer is extended to a candidate. If an E-Offer is rescinded in the Recruiting Center, the process is automatically canceled in the Onboarding (Transitions) Center.

E-Offer processes can also be started or canceled using Taleo Connect.

## Offboarding Processes

Offboarding processes can be started and canceled using Taleo Connect or via Web Services from other software products. They can also be canceled in the Onboarding (Transitions) Center.

# 11 Candidate Hiring and Onboarding

## Candidate Hiring

### Hiring a Candidate

The candidate must be at the completion status of a step.

The candidate selection workflow must include the Hire step.

A user type permission grants user access to this feature.

1. In the Candidates list, select a candidate.
2. Select Bypass in the More Actions list.
3. Select Hire in the New Step field.
4. Complete mandatory fields.
5. Click Save and Close.

The candidate is hired without going through all the steps of the candidate selection workflow. The status of the candidate is Hired.

When the last position of a requisition is filled, the requisition is automatically unposted from the company's career sections and intranet, and the requisition is no longer displayed in the requisition list. Also, the step for remaining candidates is changed to Rejected.

### Hiring a Candidate More than Once for the Same Requisition

A setting allows the activation of this feature.

The action can only be performed for one candidate at a time and on hourly requisitions (this is the only type of requisitions for which the selection process can be restarted).

The action can be performed on a candidate with the following status: Rejected, Declined, Offer, Hired.

The action cannot be performed if the application is flagged as deleted, and if the management step (RSOffer step) is part of the workflow (active or not active step), if it brings the hiring manager to a restricted step.

The requisition must be active (it cannot be canceled or filled).

The candidate must not be disqualified for the application or for their profile.

1. In a candidate list, select a candidate file.
2. In the More Actions list, select Reset Selection Process.
3. Click Done.

The candidate is now back into the selection process and can be rehired.

## Recording that a Candidate was Hired

1. In the Candidate file, select Move... from the More Actions list.
2. In the Move window, select the Hire step and Hired status.
3. Click done.

The Hired status is displayed in the candidate list indicating that a candidate has completed a selection process and is ready to be hired.

## Cancelling the Hiring of a Candidate

A user type permission grants users access to this feature.

The status must be Filled.

1. In the requisition file, select Reopen Requisition in the More Actions list.
2. Select the option Cancel the hiring of candidates.
3. Click done.

Candidates previously hired for the requisition will no longer be hired.

## Contingent Hiring

### Contingent Hiring

Contingent hiring is used to hire people when needed and for a limited period of time from a third party agency specialized in submitting pre-qualified workers. Contingent hiring may include part-time, temporary and contractor work.

The Contingent Hiring solution is meant to support the first sourcing part of the typical contingent process, where specific requisitions are created and invitations to refer candidates are performed. Once the candidate submitted by an agent is selected for a limited term, there is usually a time sheet and billing process involved, not done within the Recruiting Center.

When the Contingent Hiring feature is activated and configured by the system administrator, users can start acquiring contingent workers. When creating a requisition, users can choose a Contingent requisition type which offers specific contingent functionalities like a candidate selection workflow built for contingent hiring, a Contingent Terms section, supplier invitation to submit candidates using the agency portal, confirmation of availability and specific candidate ownership rules, different from the rules associated with other agent submitted candidates. Once the candidate is hired, the system does not provide additional support like time sheet and billing. To feed such systems, integration with worker information, billing rate and suppliers (agents) can be done upon hiring.

## Contingent Hiring Process Overview

Below are basic steps performed by a recruiter to hire contingent workers.

1. *Creating a Contingent requisition*
2. *Posting a Contingent requisition*
3. *Viewing referred candidate submissions*

### Creating a Contingent Requisition

When creating a requisition, recruiters should choose the Contingent requisition type because it provides specific functionalities like a candidate selection workflow built for contingent hiring (less prescreening, interview, or background check), and contingent specific fields such as:

- Target Start Date: Date when the worker will start working on the job.
- Target End Date: Date when the worker will complete its mandate on the job.
- Start Time: Time when the job will start, default based on the offer start date setting. Such start time is modifiable and is saved based on the current user time zone and converted upon display on the current user time zone.
- End Time: Time when the job ends every day, based on the current user time zone.
- Maximum Hourly Rate: Maximum hourly rate allowed for the current requisition.
- Requested Hourly Rate: Requested hourly rate used to inform the agent about what should be submitted.
- Estimated Expenses: Expenses that can be added in order to calculate the total estimated cost.
- Estimated Labor Cost: Hourly rate paid to the agency multiplied by the estimated number of hours per days, times the number of estimated days. This is only an estimation based on a fix number of hours per day and a fix number of days per week.
- Estimated Labor Cost and Expenses: Total estimated cost by adding the expenses to the estimated labor cost, when the expenses are reimbursable.
- Expenses Reimbursable: Checkbox field used to decide whether or not the expenses are included in the Estimated Labor Cost and Expenses field upon clicking the Calculate button or saving the requisition.

In the requisition Contingent Terms section, a Calculate button is available. When the Calculate button is pressed, the system calculates the value of the "Estimated Labor Cost" and "Estimated Labor Cost and Expenses" fields. This is based on the number of days the worker is hired based on the start date and end date, using the number of days per week (*Calculator Default Daily* setting), multiplied by the number of hours per day (*Calculator Default Hourly* setting). This number of hours is then multiplied by the requested hourly rate for the "Estimated Labor Cost" and will add the expense to this into the field "Estimated Labor Cost and Expenses" if the Expenses Reimbursable field is checked.

For details, refer to *Creating a Requisition*.

### Posting a Contingent Requisition

Once the requisition is completed and approved, it can be posted.

The only place where to send contingent requisitions is to agencies. In the contingent requisition Posting and Sourcing tab, the recruiter can only select agencies (all other options are never visible). There is no possibility to post directly to career sections and let candidate apply. The entire sourcing process depends on the agents submitting candidates.

The invitation process is slightly different for contingent requisitions. The invitation is done at the agency level, not at the agent level (for all other staffing types, each agent is invited individually). Invitations are sent to all matching agents associated to the selected contingent agencies, based on their Organization-Location-Job Field (OLF).

When the posting process is completed, selected agents receive an invitation to refer a candidate. Agents then go to the agency portal and submit their candidates.

**Note:** When posting contingent requisitions, users are able to post to non-contingent agents and the MWBE field is not displayed for contingent agents. Users should put the word Contingent and the missing field information in the agency name.

## Viewing Referred Candidate Submissions

Once candidates have been submitted, the recruiter can review candidate submissions.

To identify candidates that were submitted, the Referred by Agent icon is used in the candidates list. In the candidate file Submission tab, the recruiter can see the rate submitted by the supplier, the worker type and the information about charging or not the sales tax. The recruiter can then move the candidate in the selection workflow according to workflow configuration. If activated by the system administrator, a confirmation email is sent to the agent when a predefined status is reached.

**Note:** Ownership can exist at the candidate submission level for contingent workers. Once the general ownership is expired, another agent can submit the same candidate again on a new requisition. But while manually changing the agent in the candidate or submission file in the Recruiting Center, the referring agent is changed everywhere, impacting existing requisitions where another agent submitted the same candidate originally. Customer should not change the agent for candidates being active on at least one requisition with another agent.

# Contingent Hiring - More Actions

## Editing a Contingent Requisition

The edition of a contingent requisition is based on standard permissions and field security.

The requested hourly rate can never be saved above the maximum hourly rate. This is why we recommend to only allow some user types to change the maximum hourly rate.

Some contingent fields cannot be modified once the requisition is posted:

- Estimated Expenses
- Estimated Labor Cost
- Estimated Labor Cost and Expenses
- Expenses Reimbursable
- Requested Hourly Rate

## Duplicating a Contingent Requisition

When duplicating a contingent requisition, certain fields are not duplicated.



Requisition File Section	Field Not Duplicated
Logistics - Profile - In Contingent Requisition	Target Start Date
Logistics - Profile - In Contingent Requisition	Target End Date
Logistics - Profile - In Contingent Requisition	Start Time
Logistics - Profile - In Contingent Requisition	End Time

For more information on duplicating requisitions, see [Requisition Duplicate](#)

## Capturing Contingent Fields

When creating a candidate file, it is possible to capture contingent fields placed in the create candidate flow. Contingent fields are submission specific, thus only available for configuration into job-specific capture flows.

Contingent specific candidate fields are specific to each submission and as such, are visible or modifiable only within the submission file. For details, see [Candidate Fields to be Used for Contingent](#).

## Contingent Hiring - Exceptions to Standard Behavior

Important information regarding the behavior of specific features if used with contingent hiring.

Feature	Exception
Sourcing and posting	For contingent requisitions, sourcing is achieved exclusively through invitations sent to agents. There is no direct posting to career sections. This is because contingent hiring process relies on the association between a worker and an agent, and such association is requested at all time to correctly support contingent. To be able to invite an agent, the agent must be associated to an agency portal.
Matching candidates	<p>Although matching candidates is allowed, matching a non-contingent candidate to a contingent requisition will generate a worker without an associated agent. This situation, which is probably an exception, can be corrected by adding the agent once the candidate is matched.</p> <p>Matching a contingent worker to a non-contingent requisition is also allowed, but can generate surprises to those workers since they might start to receive direct correspondences if they have an email in their candidate file (for example, invitations to complete their file and overwrite values entered originally by the agent). This should be considered carefully to avoid generating surprises to candidates. This might also look as an attempt to bypass the agent if this was not discussed previously.</p>

Feature	Exception
Number of positions	For a contingent requisition, the start date and end date are managed within the requisition. As such, all positions of a single requisition will always have the same rate boundaries and start and end dates. If different boundaries are needed, different requisitions must be created.
Resume parsing	<p>Resume parsing can be used within the agency portal.</p> <p>It can also be used by sending attachments through emails. However, if the agent sending the email is associated to a portal without a general profile flow, the system will not be able to parse the attachment. This is because all email based parsing is profile based and never for a specific job. This is why there is a standard message template that informs agents associated to a portal without a profile flow that if they ever send a resume to the <code>zonename@resumeparsing.taleo.net</code> address, the email parsing is not supported for them. If a profile flow is active, then all standard parsing responses might be triggered.</p> <p>The message template is named <i>Resume Parsing Service Unavailable to Agents</i>. This message is triggered when the profile flow is not activated in the agency portal associated with the agent.</p>
Offer module	The offer module can be used with contingent hiring, although conceptually, the interaction between the organization and the candidate is done by the agent, thus the offer module, meant to serve as a contractual agreement between the candidate and the organization, is not the natural path. While most standard fields and user-defined fields can be made available for contingent specific offers, the contingent-specific fields such as Start Date, End Date, Start Time, End Time and Staffing Agency Hourly Rate are not available in the offer module. This aligns to the original design of contingent and is the current expected behavior.
Agency with both Staffing and Contingent Staffing services	When both the Staffing and Contingent Staffing services are selected for a specific agency, the system will act as contingent or not based on the requisition where the candidate is submitted. But if the agents associated to such agencies are submitting new candidates as general profiles - through either a profile flow or resume parsing by email - then the system will consider those candidates as non-contingent candidates. It is recommended to have only job-specific application flows when agencies serving both contingent and non contingent are required. If an agent associated to a contingent only agency is submitting a candidate profile, then the ownership delay of the contingent definition will be applied.
Hiring contingent candidates	In order to hire a candidate on a contingent requisition, the candidate must be associated to an agent. All candidates submitted through the agency portal will get such association. However, candidates created manually, matched to a contingent requisition or imported might not have such agent association at first and it must be added before being able to hire the candidate on any contingent requisition.

## Requisition Fields to be Used for Contingent

Field	Block/Form Where Available	Rules
Start Date	Profile	Mandatory by default, but it can be made optional.
Start Time	Profile	The Recruiting setting <i>Offer Default Start Date Hour</i> defines the value of this field. Default is 8 a.m.
Target End Date	Profile	Mandatory by default, but it can be made optional.
End Time	Profile	The Recruiting settings <i>Offer Default Start Date Hour</i> and <i>Calculator Default Hourly</i> define the value of this field. Default is 8 a.m and 8 hours per day.
Estimated Expenses	Contingent Terms	Represents expenses that can be added in order to calculate the total estimated cost.
Estimated Labor Cost	Contingent Terms	This is a read-only calculated field and it cannot be configured as an input field. The cost is a result of the number of hours per day ( <i>Calculator Default Hourly</i> setting) and the number of days the requisition is open, based on the difference between the end date and the start date and the number of days per week, defined in the setting <i>Calculator Default Daily</i> , with 5 days a week being the default. Since it is a calculated field, this field cannot be configured by the system administrator.
Estimated Labor Cost and Expenses	Contingent Terms	This is a calculated field, and will include the Estimated Labor Cost plus the Estimated Expenses, if the Expenses Reimbursable field is checked. Since it is a calculated field, this field cannot be configured by the system administrator.
Expenses Reimbursable	Contingent Terms	This check box field is used to decide whether or not the expenses are included in the Estimated Labor Cost and Expenses field upon clicking the calculation option or saving the requisition.
Maximum Hourly Rate	Contingent Terms	Configure the field such that it is read only for managers – do not allow editing of this field by managers. Defines the maximum hourly rate allowed for the current requisition. This value should in theory come from the template if possible, since it serves to limit the requested hourly rate amount. It also controls the maximum rate an agent can ask while submitting a candidate.
Requested Hourly Rate	Contingent Terms	This is the requested hourly rate used to inform the agent about what should be submitted.

## Candidates Fields to be Used for Contingent

Field	Default Field Visibility
Staffing Agency Hourly Rate	Career Section (not relevant to recruiters, for integration purpose only).

Field	Default Field Visibility
Sales Tax must be charged	Career Section, Taleo Recruiting.
Hourly Rate Paid to the Worker	Career Section (not relevant to recruiters, for integration purpose only).
Agency Requisition Number	Career Section (not relevant to recruiters, for integration purpose only).
Worker ID	Career Section (not relevant to recruiters, for integration purpose only).
Worker Type	Career Section, Taleo Recruiting.

## Hourly Hiring

### Evergreen Hiring

Evergreen hiring is used in continuous hiring situations such as retail stores where employers want to enable candidates to apply at all times, and also want a ready supply of candidates available to move quickly when a need is identified.

Often such employers will want to implement a definite validity period and expiration for the candidate's submission, with the easy ability for the candidate to re-apply after a submission expires. It is not uncommon for workers in the hourly retail world to have held several different jobs within the span of a year. Employers need to ensure they are collecting all of the most recent information regarding a candidate's relevant history. This may also help to limit legal exposures in addition to confirming candidate's continued interest in employment with the employer.

A submission validity period may be enabled for any requisition, before that requisition reaches the Sourcing status. The number of days for the validity period is inherited from a default setting (initially 90 days), but may be changed for specific requisitions by users with sufficient permissions. The Validity Period and Validity Period Enabled fields may also be inherited from a requisition template. The submission validity period must be between 1 and 730 days (2 years).

The validity period starts when a candidate submits a completed submission. The candidate submission remains valid for the number of days defined in the requisition. For submissions created when matching or referring a candidate, the period starts on the date that the candidate was matched or referred. If a submission is incomplete and the candidate later completes it, the validity period is restarted.

The Evergreen Hiring feature basically works as follows:

For the Evergreen Hiring feature to be available, the system administrator must make the following two requisition fields available in the Recruiting application:

- Validity Period Enabled
- Validity Period

If desired, the security level can be set for those fields to hide them from some users. Once these fields are activated, the system administrator can add them to the requisition and/or requisition template, in the Identification block. It is necessary to have the Validity Period Enabled field in either the requisition template and/or the requisition file in order to enable submission expiration.

**Note:** If the expiration for all requisitions is the same (following the default setting), consider to either not display the Validity Period field in the requisition file, or to set the field to read-only. If different validity periods are needed for different jobs, consider adding the Validity Period field in the requisition template where authorized users can set it, but not in the requisition file itself.

In the Recruiting application, when creating a requisition or requisition template, users can use the default validity period set by the system administrator or set a different validity period for the requisition or requisition template being created. The validity period must be set before the requisition is posted. The submission validity period is displayed in the requisition card (located on the left hand side of the requisition), when hovering the mouse over the Submission Expired icon.

Once the requisition is posted, candidates applying on the requisition will be informed of the expiration date of their submission on the Thank You page. Within the Recruiting Center, the submission validity period is displayed in the candidate submission card, when hovering the mouse over the Submission Expired icon.

If the candidate's submission has expired and the requisition is still posted, the Modify link is replaced with the Reapply link on the candidate's My Jobs page. When candidates re-apply for a job:

- The submission's validity period and expiration date are reset.
- A summary of the candidate's current information is displayed to allow the candidate to make changes.
- Depending on how the zone was configured, the candidate selection workflow of the submission may be reset back to the beginning.
- A tracking history is automatically added in candidate file History tab. If during the reapply process, the system forces the candidate selection workflow to be reset, a second tracking history is added in the History tab stating that.

Once candidates have applied on the requisition, the column in the Requisitions list indicating the candidate count considers if the submission validity period is enabled or not for the requisition. If the validity period is enabled, the count only includes candidate submissions that are not expired.

The system administrator also has the ability to add the following columns in the candidate lists and requisition lists. When these columns are made available in list formats, users can select them to display the desired information:

Candidate List Columns	Description
Submission Expired	This column is represented by the Submission Expired icon. When a submission is expired, a red icon is displayed.
Latest Submission Date	Date when the candidate has submitted a submission or has reapplied.
Submission Expiration Date	Date when the candidate submission expires/expired.
Days before Submission Expiration	Displays as a countdown the number of days left before the expiration of the submission.

Requisition List Columns	Description
Submission Validity Period Enabled	This column is represented by the Submission Expired icon.
Submission Validity Period	Number of days of the validity period.

The *Hide expired submissions* quick filter can be added to Candidates list to let users show or hide expired candidate submissions. Expired submissions are hidden by default. This filter is only available for requisition-specific candidate list formats.

The system administrator can also enable a setting to determine under which conditions the Candidate Selection Workflow (CSW) is reset to the initial step/status after a candidate re-applies for the same requisition (after submission expiration). The CSW will never change if the submission has reached the *Offer* step or if an interview has been scheduled.

## Onboarding

### Candidate Onboarding

Employee onboarding is the process of integrating a new employee into an organization.

Onboarding begins when a person accepts a position; it can include orientation, communication, filling out forms, getting equipment such as a laptop.

### Starting an Onboarding Process

Candidate must be hired.

A user type permission grants users access to this feature.

1. In the Candidates list, select a candidate.
2. In the More Actions list, select Start Onboarding (Transitions) Process.
3. Select a process.
4. Specify if you wish to update onboarding data with current recruiting data.
5. Click Done.

### Cancelling an Onboarding Process

Candidate must be involved in an onboarding process.

A user type permission grants users access to this feature.

1. In the Candidates list, select a candidate.
2. In the More Actions list, select Cancel Onboarding (Transitions) Process.
3. Enter a comment.
4. Click Done.

The process is cancelled. Action is tracked under the candidate file History tab.

# 12 Pipeline Management

## Pipeline Management

Pipeline Management provides the ability to distinguish between contacts and candidates and to build a pipeline of contacts who can be tracked and managed separately.

The Talent acquisition process includes the development of contacts, which are individuals who have never been considered for a job, but have the skills, background, and experience an organization is looking for. Pipeline Management provides customers with a way to manage the lifecycle of candidates through the state of being a contact in a pipeline to being considered on an open requisition.

The system now differentiates requisitions as follows: job requisitions used to hire candidates, and Pipeline Requisitions to build a pipeline of candidates.

Two Pipeline requisition types are available:

- Pipeline - General
- Pipeline - Executive

## Using Pipeline Management

Pipeline Management provides a way to manage the lifecycle of candidates through the state of being a contact in a pipeline to being considered on an open requisition

### Pipeline Requisitions

Two Pipeline requisition types are available when creating requisitions and requisition templates:

- Pipeline - General
- Pipeline - Executive

A Pipeline candidate selection workflow is selected by default for Pipeline requisitions. This workflow includes one step tied to the Pipeline reference model. See [Creating Pipeline Requisition](#).

### Pipeline Requisitions in the Requisitions Channel

The Requisitions channel in the center stage displays requisitions in two groupings: Job Requisitions and Pipeline Requisitions. Pipeline requisitions cannot be displayed in the center stage mini requisition list.

When Recruiting Center users click a status link under Job Requisitions, the Requisitions list is filtered by status and also by the following requisition types: Professional, Executives, Hourly, Campus, Contingent.

When Recruiting Center users click a status link under Pipeline Requisitions, the Requisitions list is filtered by status and also by Pipeline - General, and Pipeline - Executive requisition types. For Pipeline Requisitions, the following statuses

can be displayed: Draft, Open, On Hold, Pending. If none of the requisitions has one of these statuses, the count will not be displayed in the Requisitions channel.

### Matching Candidates to Pipeline Requisitions

Recruiting Center users can match candidates to Pipeline requisitions. The process is the same as for other types of requisition. See *Matching Candidates to Requisitions*. In the history tracking for requisitions and candidate submissions, the system will record two entries: one in the source requisition and one in the target requisition.

When a candidate is matched to a Pipeline requisition, from a general profile or submission context, an event is added in the requisition History tab:

- Event: Candidates Matched to this Requisition
- Details: Candidates were matched to this requisition from xyz

When a candidate is matched to a Pipeline requisition from a submission, an event is added in the History tab of the requisition from where the candidate was matched:

- Event: Candidates Matched From this Requisition
- Details: Candidates from this requisition were matched to xyz

When a candidate is matched to a Pipeline requisition, from a submission or general profile, the event "Candidate Matched" is added in the History tab of the newly created submission.

### Using the Most Advanced Progression Status

The Most Advanced Progression Status feature is used for the Pipeline Management functionality. It allows for easier visibility into those candidates that have not been processed or for which no action has been taken. See *Candidate Progression Status*.

- The Pipeline, Hired, and Contact statuses are supported.
- The Most Advanced Progression Status quick filter is available. Values are:
  - Contact: Available if Pipeline Management is activated. The person has never been considered for a job or pipeline requisition. Or, the person has been considered for a job and pipeline requisition in the past, but has currently no active job or pipeline submission.
  - Pipeline: Available if Pipeline Management is activated. The person is not being considered for an active job requisition but is active in a pipeline requisition.
  - New
  - Interview (1, 2 or 3)
  - Testing
  - Offer
  - Hire
- The Most Advanced Progression Status advanced filter is available.
- The Most Advanced Progression Status search criterion can be included in the Advanced Search if the field was made available for search by the system administrator.



## Creating a Pipeline Requisition

A user type permission grants users access to this feature.

1. Under Requisitions, click Create Requisition.
2. Select the Pipeline - General or the Pipeline - Executive requisition type.
3. Click Next.
4. Follow on-screen instructions and complete the fields.

The information you will need to provide depends on the flow and options configured by your system administrator.

5. Click Save.

The requisition appears in the Requisition list and the status is Draft.



# 13 Libraries

## Libraries

### Library

The Recruiting Center offers libraries containing requisition templates, questions, disqualification questions, competencies as well as questions, skills and questionnaires used in Evaluation Management.

When accessing a library, the screen is organized into three panes:

- The left pane contains quick filters. For Questions and Competencies, there are tabs allowing users to display elements associated to all or specific job fields as well as elements associated all or specific locations.
- The central pane presents the list of elements. Elements displayed depend on the filters and options selected in the left pane. A menu bar allows users to perform specific actions on elements.
- The right pane contains the *online help* and *online clips* if these were enabled. The pane can be expanded or collapsed.

**Note:** Users who have access to a library can access all items in the library. The system provides a flat list view option which help reduce duplication and mis-alignment of similar elements across the organization. Therefore, when users are in the tree structure view for Job or Location, they are not constrained by Job and Location elements that are linked to their group. They can navigate and interact with the entire tree structure.

## Requisition Template

### Requisition Template

A requisition template is a requisition file containing information that will likely be reused for a similar job position.

Requisition templates are located in the Libraries menu, under Templates.

A requisition template can be created for each position or job category. Depending on your organization's policies, the requisition template may be very detailed or may include only basic information. When creating a new requisition, it is a best practice to select a requisition template first; this will auto-populate many of the requisition fields based on the selected template.

The creation of requisition templates is done via the Create Requisition Template assistant which is available in the Requisition Templates library. A user type permission is required to create requisition templates. When clicking Create

Template, the Create Requisition Template assistant is launched. The creation process is similar to the creation of requisitions. The content of the assistant will vary depending on how it was configured by the system administrator.

- The first step may be to select a *requisition type*. This step is available if more than one requisition type was enabled and if specific permissions were granted to users.
- The second step may be to select an *Organization, Location and/or Job Field*.

When all of the above have been specified, users complete the various fields of the requisition template.

When saving the requisition template, a message appears if information is missing in certain fields. Users can also use the *diagnostic tool* to know which fields must be filled to be able to save the requisition template.

When the requisition template is complete, its status is Draft. The template must be activated to be used. The activation is done during the requisition template creation or later on by selecting the Active status within the template.

**Note:** If a user creates a requisition using a requisition template that contains data that the user cannot see, the data will appear in the requisition regardless of the access to the data by the user. For example, if a recruiter is not authorized to see prescreening information but the Prescreening section exists in the requisition template, the prescreening information will appear in the requisition and be visible to the recruiter when the recruiter accesses the file.

**Note:** Both the recruiter and user group fields can be specified in the requisition template but unlike other fields in the template. These fields will not fill in as defaulted fields in requisitions created from the template. The purpose of the recruiter field in a requisition template is to give a user ownership privilege of the template from a template access viewing and filtering perspective in the Template library. The purpose of the user group field specified in a requisition template is to define which users will be authorized to create requisitions using this template. Only those matching the group will see the template if a group has been specified.

## Creating a Requisition Template

A user type permission grants users access to this feature.

1. In the Libraries menu, select Templates.
2. Click Create Template.
3. Follow on screen instructions.
4. Click Save.

## Activating a Requisition Template

A user type permission grants users access to this feature.

The requisition template must be Inactive or Draft.

1. In the Libraries menu, select Templates.
2. In the Requisition Templates page, click a template.
3. Click Edit.
4. Select Active.
5. Click Save and Close.

The requisition template is available to Recruiting Center users.

## Duplicating a Requisition Template

A user type permission grants users access to this feature.

1. In the Libraries menu, select Templates.
2. Click a template.
3. Click the Duplicate Template icon.
4. Modify the information.
5. Click Save and Close.

## Editing a Requisition Template

A user type permission grants users access to this feature.

1. In the Libraries menu, select Templates.
2. Click a template.
3. Click Edit.
4. Modify fields as required.
5. Click Save and Close.

## Deactivating a Requisition Template

A user type permission grants users access to this feature.

The requisition template must be Active.

1. In the Libraries menu, select Templates.
2. Click a template.
3. Click Edit.
4. Select Inactive.
5. Click Save and Close.

The requisition template is no longer available for use.

## Deleting a Requisition Template

A user type permission grants users access to this feature.

The requisition template status must be Draft.

1. In the Libraries menu, select Templates.
2. Click a draft requisition template.
3. Click the Remove icon.
4. Click Yes in the message box.

# Question

## Question

Prescreening questions are used to prescreen candidates and find the best candidates for a job.

Prescreening questions can be created in the Questions Library as well as directly in a requisition.

Prescreening questions created in the Questions Library are available in the Questions Library and can then be added in the Prescreening section of a requisition file. A user type permission grants users access to the Questions Library as well as to the actions that can be performed on questions in the Questions Library.

Prescreening questions created directly in a requisition are only available for the requisition and they are not available in the Questions Library for other requisitions. If at a later date you use that same requisition to create a requisition template, the question that you created in the requisition will not be added to the Questions Library. However, if the question is created for a requisition template, then the question will be added to the library. Questions linked to a requisition are not duplicated in the requisition; they are re-used. Therefore, any changes made to such a question from the requisition will be applied to the question in the Questions Library as well. These changes will therefore also appear in all requisitions to which this question is linked. A user type permission grants users access to the actions that can be performed on questions in the requisition Prescreening section.

Three types of prescreening questions can be created:

Question Type	Description
Single Answer Question	The candidate selects one answer from a list of choices. <ul style="list-style-type: none"> <li>Example: Please indicate the highest level of education that you have attained.</li> </ul>
Multiple Answer Question	The candidate selects as many answers as applicable from a list of choices. <ul style="list-style-type: none"> <li>Example: Please indicate in which areas you have a demonstrated knowledge and understanding of (check all that apply).</li> </ul>
Text Question	The candidate types a brief answer in response to a specific question. Use text questions sparingly; use them where they can allow for expansion of information asked in a previous question. <ul style="list-style-type: none"> <li>Example: Provide a short overview of a program you have designed and implemented that had impact on employee development.</li> </ul>

A question can have a maximum of 3000 characters.

Depending on the type of question created, different answer formats are available:

- radio button
- pop-up list

Each question is assigned a code. With this unique code, users are able to standardize questions and better control their import/export mechanism. When creating a question, users are required to assign a code to questions created in the Questions Library. For questions created at the requisition level, a code is generated automatically.

Questions have one of the following statuses:

- draft
- active
- inactive

Even if a question has been used in the past, it is possible to inactivate the question in the Questions Library. Once inactive, a question is retained on existing requisitions but cannot be used in newly created requisitions. Inactive questions are also removed from active templates and cannot be carried over when duplicating a requisition where a question was active. Also, now that a code is assigned to each question, it is easy to deactivate the right question when users realize they have a duplicate. In addition, users who manage questions can wait until a question is ready before making it available to end users.

When creating a question in the Questions Library, users can make the question visible to internal candidates, external candidates or all candidates.

When creating a question in the Questions Library, the question can be associated to locations and/or job fields. Associating questions to locations and/or job fields helps the user to select the appropriate questions while using the selector window. If questions associated to locations and/or job fields are included in models, the Apply Model function available in the requisition will bring the appropriate questions into the requisition based on the locations and job fields of the requisition.

When associating a question to locations or job fields, the question can be made available in a profile or in a model:

- If a question is tagged "In profile", the question will be available to users who create a candidate file, and to candidates who are entering their profile in a career section. Questions made available will be sorted to match the location and job field preferences defined by the candidate.
- If a question is tagged "In model", the question will be applied to requisitions when users click the Apply Model function in the Prescreening section of a requisition. Questions will be grouped in a model based on the location and job field of the requisition.

Once a question is created in the Questions Library, users can add it to the Prescreening section of a requisition file. When adding questions to a requisition file, users should consider balancing the number of questions with the expected candidate volume and job complexity.

The following table shows the recommended number of questions as per the number of candidates expected and the job complexity.

	<b>Difficult to Fill Position</b>	<b>Average to Fill Position</b>	<b>Easy to Fill Position</b>
<b>Number of Candidates Expected</b>	Low - Less than 30	Medium - 30 to 100	High - 100 +
<b>Recommended Number of Questions</b>	8 or less	12 or less	As many as required
<b>ACE Indicators</b>	Use Required  Use Asset optionally  Do not use Weight	Use Required,  Use Asset  Use Weight optionally	Use Required  Use Asset  Use Weight

<b>% of Candidates Identified as ACE Candidates</b>	15% and higher	10% to 15%	5% to 10%
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The difficult to fill position expects few candidates. Fewer questions should be used. As a rule of thumb, do not exceed 8 questions (job specific and skills together).

The average to fill position should keep candidates engaged, but not lose them due to too many questions. As a rule of thumb, do not exceed 12 to 15 questions (job specific and skills together).

The easy to fill position expects a large number of candidates. You can use as many questions as necessary (job specific and skills together).

**Note:** It is possible to edit a library question from within a requisition or requisition template. Please be aware that by doing that the question is also modified in all the requisitions using that question. To avoid any confusion, refrain from editing library questions. Editing local questions can only be done within requisitions.

**Note:** It is not possible to delete questions in the Questions Library. Instead, use the Deactivate Question option.

## Question Writing Tips

Questions must be written to obtain useful data from candidates and to facilitate the hiring process. When creating questions to prescreen candidates, these simple rules will help you achieve these goals.

Tip	Description
<b>Using the right amount of questions</b>	Balance the number of questions with the job complexity and expected candidate volume.
<b>Writing effective questions</b>	The question should contain Required and Asset criteria.  The question should help you sort candidates who apply for the position.  The response to the question should provide value in determining the caliber of the candidate for the position.
<b>Using Yes/No questions</b>	Use Yes/No questions for straight-forward requirements. For other questions, consider answer ranges that make it less obvious what the correct answer is.  Do not use a Yes/No question for question of type <i>Do you have a Bachelor's degree?</i>
<b>Including an "Out" answer</b>	Always include an "out" answer to the question such as None of the above, None or Not applicable. Otherwise you force the candidate to be untruthful. For example: <i>With which of the following software do you have experience? Microsoft Word, Microsoft Excel, Microsoft PowerPoint, None.</i>
<b>Standardizing questions and answers</b>	Standardize answer ranges to questions to give the candidate a positive experience. For example, always put "None of the above" at the top or bottom of the answer list. Also, all years of experience questions should have the same ranges in the same order. For example: <i>Indicate the highest level of education you have attained. High School Diploma, Associates Degree, Bachelor's Degree, Master's Degree, Doctorate Degree, None of the above.</i>



Tip	Description
<b>Reviewing grammar and spelling</b>	A best practice is to review the questions and answers for grammar and spelling
<b>Using strong verbs</b>	Use strong verbs in questions such as "write a program" or "operate". Avoid phrases containing words like "work with" or "involved in".
<b>Using known acronyms</b>	Use only highly recognized acronyms such as IT.
<b>Using examples in the question</b>	Use examples if necessary and reveal more about the position within the question. For example: <i>In this position, you will be required to drive within a 200 mile radius to various merchandise outlets. Do you have a valid driver's license?</i>
<b>Adhering to legal guidelines</b>	Adhere to legal guidelines by checking with your Employment Law and Diversity officers, keeping questions directly job-related (no personal questions). Also, do not create questions that may lead to discrimination.
<b>Asking one question per question</b>	Do not ask too many different questions within one question. For example, avoid questions such as this one: <i>Please indicate the number of years you have hands-on experience in marketing, accounting and/or manufacturing.</i> It would be more valuable to restructure the question completely or to simply have three different questions if it is important to know the number of years the candidates have worked within those three areas.
<b>Separating questions for years of experience and proficiency</b>	Many times, candidates are asked about the number of years they have performed certain tasks or worked within a certain industry. However, it can be more helpful to know the candidate's proficiency or how well the candidate performs a certain task. Ask yourself if it is more important to know the number of years of experience or the level of proficiency to evaluate a candidate

## Creating a Question

A user type permission grants users access to this feature.

The question can have a maximum of 3000 characters.

### Recruiting > Libraries > Questions

1. Click Create Question.
2. Select the type of answer.
3. Complete mandatory fields.
4. Select necessary information.
5. Click Save and Close.

The question is available in the Questions Library.

## Activating a Question

A user type permission grants users access to this feature.

The question must be draft or inactive.

#### **Recruiting > Libraries > Questions**

1. Select a question.
2. In the More Actions list, select Activate Question.

The status of the question is Active. The question is available for selection in a requisition

## Deactivating a Question

A user type permission grants users access to this feature.

The question must be active.

#### **Recruiting > Libraries > Questions**

1. Select a question.
2. In the More Actions list, select Deactivate Question.

The question remains in the Questions Library with the Inactive status.

## Editing a Question

A user type permission grants users access to this feature.

If the question is active, only grammatical and typographical corrections are allowed.

If the question is draft, any corrections are allowed.

An inactive question cannot be edited.

#### **Recruiting > Libraries > Questions**

1. Click on a question.
2. Click Edit.
3. Make modifications.
4. Click Save and Close.

Changes will be applied to questions that will eventually be added to a requisition. Changes are not applied in a requisition that already contains a question.

## Duplicating a Question

A user type permission grants users access to this feature.

#### **Recruiting > Libraries > Questions**

1. Select a question.
2. Click Duplicate.
3. Modify the information in the fields.
4. Translate the question if necessary.
5. Click Save and Close.

The question created based on an existing one is available in the Questions Library.

## Associating a Question to a Location

A user type permission grants users access to this feature.

Question should have the draft or active status.

### **Recruiting > Libraries > Questions**

1. Click on a question.
2. In the question page, click Edit.
3. In the Locations section, specify if you want to associate the question to all locations or to specific locations.  
If you associate the question to specific locations, click Modify, select a location in the Location selector, then click Save.
4. Click Save and Close.

Users are able to add the question in a requisition if the question matches the location of the requisition.

## Associating a Question to a Job Field

A user type permission grants users access to this feature.

Question should have the draft or active status.

### **Recruiting > Libraries > Questions**

1. Click on a question.
2. In the question page, click Edit.
3. In the Job Fields section, specify if you want to associate the question to all job fields or to specific job fields.  
If you associate the question to specific job fields, click Modify, select a job field in the Job Field selector, then click Save.
4. Click Save and Close.

Users are able to add the question in the requisition if the question matches the job field of the requisition.

## Dissociating a Question from a Location

A user type permission grants users access to this feature.

Question should have the draft or active status.

### **Recruiting > Libraries > Questions**

1. Click on a question.
2. Click Edit.
3. In the Associated Structure section, clear the Locations check boxes.
4. Click Save and Close.

A question which is not associated to any location remains in the Questions Library but can only be added manually to a requisition.

## Dissociating a Question from a Job Field

A user type permission grants users access to this feature.

Question should have the draft or active status.

### **Recruiting > Libraries > Questions**

1. Click on a question.
2. Click Edit.
3. In the Associated Structure section, clear the Job Fields check boxes.
4. Click Save and Close.

A question which is not associated to any job field remains in the Questions Library but can only be added manually to a requisition

## Adding a Question to the Job Field or Location Structure

A user type permission grants users access to this feature.

### **Recruiting > Libraries > Questions**

1. Click on the Job Field or Location tab in the left pane.
2. Click Add Question...
3. Click Select next to the desired question.
4. Click Done.

The user adding a question to a requisition will be presented with a selector window containing questions matching the Organization-Location-Job Field structure of the requisition.

## Removing a Question from the Job Field or Location Structure

A user type permission grants users access to this feature.

### **Recruiting > Libraries > Questions**

1. Click on the Job Field or Location tab in the left pane.
2. Select a question.
3. Click Remove Question.

By removing a question from the Location and/or Job Field structure, the user adding a question to a requisition will be presented with a selector window containing this question regardless of the requisition Organization-Location-Job Field structure. The selector window presents questions matching the Organization-Location-Job Field structure of the requisition or any questions that is not associated to any Organization-Location-Job Field

## Adding a Question to the Model

A user type permission grants users access to this feature.

### **Recruiting > Libraries > Questions**

1. Click on the Job Field or Location tab in the left pane.
2. Select a question.
3. In the More Actions list, click Add to Prescreening Model.

In the Questions Library list, a check mark appears in the In Model column, next to the question. The question is available to another user completing the Prescreening section of a requisition.

## Removing a Question from the Model

A user type permission grants users access to this feature.

### **Recruiting > Libraries > Questions**

1. Click on the Job Field or Location tab in the left pane.
2. Select a question.
3. In the More Actions list, click Remove from Prescreening Model.

In the Questions Library list, a check mark no longer appears in the In Model column, next to the question. The question is no longer available to another user completing the Prescreening section of a requisition.

## Adding a Question to the Profile

A user type permission grants users access to this feature.

### **Recruiting > Libraries > Questions**

1. Click on the Job Field or Location tab in the left pane.
2. Select a question.
3. In the More Actions list, click Add to Profile.

In the Questions Library list, a checkmark appears in the In Profile column, next to the question. The question is available to another user creating a candidate file and to a candidate completing a profile in a career section.

## Removing a Question from the Profile

A user type permission grants users access to this feature.

### **Recruiting > Libraries > Questions**

1. Click on the Job Field or Location tab in the left pane.
2. Select a question.
3. In the More Actions list, click Remove from Profile.

A check mark no longer appears in the In Profile column, next to the question. The question is no longer available to another user creating a candidate file and to a candidate entering a profile in a career section.

## Viewing a Question in Another Language

A user type permission grants users access to this feature.

The Earth icon must be displayed next to the question in the Question list.

### **Recruiting > Libraries > Questions**

1. Click on a question.
2. Select a language from the Activated Languages list.

The question is displayed in the selected language.

## Changing the Visibility of a Question

A user type permission grants users access to this feature.

### **Recruiting > Libraries > Questions**

1. Click on a question.
2. Click Edit.
3. In the Question Properties section, select the visibility from the Visible by drop down list.
4. Click Save.

The selected question will be visible to internal, external or all candidates according to the selected visibility.

## Disqualification Question

### Disqualification Question

A disqualification question is a single-answer question that contains the minimum requirements for a candidate to be eligible for a job. A candidate not meeting the required response can be instantly exited from the application process.

To have access to disqualification questions, this feature must be activated within your company.

Disqualification questions are created and configured in the Disqualification Questions Library. Questions available in the Disqualification Questions Library can appear in the Prescreening section of a requisition file if the locations and job fields of the disqualification question matches the locations and job fields of the requisition.

A disqualification question can be viewed by internal candidates, external candidates or all candidates.

A disqualification question requires one answer from the candidate, that is the candidate is limited to one answer from a list of choices. When creating a disqualification question, at least two answers must be provided, one of which must indicate that the candidate passes. There are three possible results for each answer:

- The candidate passes: the candidate is not disqualified.

- The candidate is disqualified: the candidate is automatically disqualified.
- To be verified: the candidate file must be reviewed.

Unanswered disqualification questions are considered as being passed and will not affect the disqualification status of the candidate.

### **Explanations for Disqualification Questions**

If configured by your system administrator, you can configure disqualification questions (active, draft or inactive) so that candidates are required to provide explanations for specific answers. This feature provides candidates a greater opportunity to accurately explain their qualifications and it also reduces the need for users to make follow-up contact with candidates to obtain details regarding their responses.

If an explanation is required for an answer, the user must enter an introduction sentence for the explanation.

For example, if the question is "Have you ever been convicted of a crime?", the introduction sentence could "Please specify the crimes you were convicted for as well as any details". A maximum of 256 characters can be entered.

When applying, if the candidate selects a response to a disqualification question requiring an explanation, the candidate must provide it. A maximum of 1000 characters can be entered for the explanation. Authorized recruiters and managers can also enter an explanation on behalf of the candidate either by capturing or editing the candidate submission.

When an explanation is provided for an answer, the explanation is displayed just below the question answer in the candidate file Prescreening section.

### **Association to Locations and Job Fields**

A disqualification question can be associated to locations and job fields.

- If a question is not associated to any location or job field, the question will be displayed in the requisition.
- If a question is associated to all locations and/or to all job fields, the question will be displayed in the requisition.
- If a question is associated to specific locations and/or job fields, the question will be displayed in the requisition if it matches the location or job field of the requisition.

### **Disqualification Question Translation**

The translation of a disqualification question in all languages is not forced by the system (this behavior exists since Taleo 10). The content writer or library administrator should make sure to translate the disqualification question in all appropriate languages. Disqualification questions that are not associated to a Location of Job Field must be translated in all languages (since they can be displayed to all candidates). Disqualification questions associated to locations of job fields can now be translated only in the appropriate languages; it is no longer needed to translate them into unused languages.

### **History Tracking**

The system tracks changes done to the answer of a disqualification question. Changes are visible in the History tab.

Answers to library based questions, be prescreening questions or disqualification questions, are unique, meaning they are shared across all requisitions using the questions. Tracking of changes done to an answer is propagated for prescreening questions, disqualification questions and competencies.

Changes done to the answer of a disqualification question in the context of a job submission will produce a tracking entry in the History tab of all job submissions where the question is used.

Regarding changes done by the Disqualification Questions Library manager, the behavior is:

- Changes done to a question in the library are tracked in the library. In the History tab, users can see who changed a question and when the change was done.
- Changes to questions or possible answers are visible right away into requisitions and candidate files.
- To ensure data integrity, the status of a disqualification question answer cannot be changed.

The possible results to a disqualification question answer (that is, the candidate passes, the candidate is disqualified, to be verified), cannot be modified once the disqualification question has been used.

In the case of a disqualification question that is not associated to a Location or Job Field, any changes done to its answers are tracked.

## Creating a Disqualification Question

A setting allows the activation of this feature.

The question can have a maximum of 1000 characters.

### **Recruiting > Libraries > Disqualification Questions**

1. Click Create Question.
2. Complete mandatory fields.
3. Specify required information.
4. Click Save and Close.

The disqualification question is available in the Disqualification Questions Library. New disqualification questions added to existing requisitions will not affect candidates who have already applied until they update their profile or their submission.

## Duplicating a Disqualification Question

A setting allows the activation of this feature.

### **Recruiting > Libraries > Disqualification Questions**

1. Select a question.
2. Click Duplicate.
3. Modify the information in the fields.
4. Translate the question if necessary.
5. Click Save and Close.

The disqualification question created based on an existing one is available in the Disqualification Questions library.

## Editing a Disqualification Question

A setting allows the activation of this feature.

If a question is active, only grammatical and typographical corrections are allowed.



If a question is draft, any corrections are allowed.

Inactive questions cannot be edited.

#### **Recruiting > Libraries > Disqualification Questions**

1. Click on a disqualification question.
2. Click Edit.
3. Make modifications.
4. Click Save and Close.

Modifications to a disqualification question do not affect already answered questions. Candidates who had passed will still pass. Candidates who had been disqualified will remain disqualified.

## Associating a Disqualification Question to a Location

A setting allows the activation of this feature.

#### **Recruiting > Libraries > Disqualification Questions**

1. Click on a question.
2. Click Edit.
3. In the Locations section, specify if you want to associate the question to all locations or to specific locations.  
If you associate the question to specific locations, click Modify, select a location in the Location selector, then click Save.
4. Click Save and Close.

The disqualification question will be added to a requisition if the location of the disqualification question matches the location of the requisition.

## Associating a Disqualification Question to a Job Field

A setting allows the activation of this feature.

#### **Recruiting > Libraries > Disqualification Questions**

1. Click on a question.
2. Click Edit.
3. In the Job Fields section, specify if you want to associate the question to all job fields or to specific job fields.  
If you associate the question to specific job fields, click Modify, select a job field in the Job Field selector, then click Save.
4. Click Save and Close.

The disqualification question will be added in a requisition if the question matches the job field of the requisition.

## Dissociating a Disqualification Question from a Location

A user type permission grants users access to this feature.

Disqualification Questions should have the draft status.

Inactive disqualification questions cannot be dissociated from a job field.

#### **Recruiting > Libraries > Disqualification Questions**

1. Click on a question.
2. Click Edit.
3. In the Associated Structure section, clear the Job Fields check boxes.
4. Click Save and Close.

By dissociating a disqualification question from a location, the question will be available to be added to all requisitions regardless of the location specification of a requisition.

## Dissociating a Disqualification Question from a Job Field

A user type permission grants users access to this feature.

Disqualification Question should have the draft status.

Disqualification Question must not be used by a posted requisition.

Inactive disqualification questions cannot be dissociated from a job field.

#### **Taleo Recruiting > Libraries > Disqualification Questions**

1. Click on a question.
2. Click Edit.
3. In the Associated Structure section, clear the Job Fields check boxes.
4. Click Save and Close.

The question will not appear in a new requisition related to the previously selected job field. By dissociating a disqualification question from a job field, the question will be available to be added to all requisitions regardless of the job field specification of a requisition

## Adding a Disqualification Question to the Job Field or Location Structure

A setting allows the activation of this feature

A user type permission grants users access to this feature.

#### **Recruiting > Libraries > Disqualification Questions**

1. Click on the Job Field or Location tab in the left pane.
2. Click Add Question...
3. Click Select next to the desired question.
4. Click Done.

The user adding a disqualification question to a requisition will be presented with a selector window containing questions matching the Organization-Location-Job Field structure of the requisition

## Removing a Disqualification Question from the Job Field or Location List

A setting allows the activation of this feature.

### **Recruiting > Libraries > Disqualification Questions**

1. Click on the Job Field or Location tab in the left pane.
2. Select a question.
3. Click Remove Question.

By removing a disqualification question from the location or job field list, users will be able to add the question to all requisitions regardless of the location or job field of a requisition

## Activating a Disqualification Question

A setting allows the activation of this feature.

The question must have a draft or inactive status.

### **Recruiting > Libraries > Disqualification Questions**

1. Select a question.
2. In the More Actions list, select Activate Question.

The status of the disqualification question is Active. The disqualification question is displayed in the requisition.

## Deactivating a Disqualification Question

A setting allows the activation of this feature.

The question must be active in order to be deactivated.

### **Recruiting > Libraries > Disqualification Questions**

1. Select a question.
2. In the More Actions list, select Deactivate Question.

The disqualification question no longer appears in the Disqualification Questions Library.

## Changing the Visibility of a Disqualification Question

A user type permission grants users access to this feature

### **Recruiting > Libraries > Disqualification Questions**

1. Click on a disqualification question.
2. Click Edit.
3. In the Question Properties section, select the visibility from the Visible by drop down list.

#### 4. Click Save.

The selected disqualification question will be visible to internal, external or all candidates according to the selected visibility.

## Competency

### Competency

A competency is used to gather proficiency level and years of experience of a candidate in order to find the best candidate for a job.

Competencies are supplied with the system and are available in the Competencies Library. Active competencies are displayed by default. The Active quick filter can be removed to display both active and inactive competencies. Competencies can then be added in the Prescreening section of a requisition file. A user type permission grants users access to the Competencies Library as well as to the actions that can be performed on Competencies in the requisition file Prescreening section and in the Competency Library.

Competencies are not written as a question. Examples of competencies could be "Human resource planning", "Develop, implement and evaluate human resources policies and procedures".

A competency can be visible to internal candidates, external candidates or all candidates.

A competency can be associated to locations and job fields.

- If a competency is not associated to any location or job field, the competency will be available to users when adding competencies to a requisition.
- If a competency is associated to all locations and/or to all job fields, the competency will be available to users when adding competencies to a requisition only if the In Model option is selected.
- If a competency is associated to specific locations and/or job fields, the competency will be available to users when adding competencies to a requisition if the In Model option is selected and if the competency matches the locations or job fields of the requisition.

When associating a competency to locations or job fields, the competency can be made available in a profile or in a model:

- If a competency is tagged "In profile", the competency will be available to users who create a candidate file, and to candidates who are entering their profile in a career section. Competencies made available will be sorted to match the location and job field preferences defined by the candidate.
- If a competency is tagged "In model", the competency will be available to users who complete the Prescreening section of a requisition. Competencies will be grouped in a model based on the location and job field of the requisition.

## Creating a Competency

Competencies are supplied with the system, they cannot be created by a user or a system administrator. Contact Oracle Support for more information.

## Editing a Competency

A user type permission grants users access to this feature.

### Libraries > Competencies

1. Click on a competency.
2. Click Edit.
3. Make modifications.
4. Click Save and Close.

The visibility of the competency as well as the locations and job fields associated to the competency reflect changes.

## Associating a Competency to a Location

A user type permission grants users access to this feature.

### Libraries > Competencies

1. Click on a competency.
2. Click Edit.
3. In the Locations section, specify if you want to associate the competency to all locations or to specific locations.  
If you associate the competency to specific locations, click Modify, select a location in the Location selector, then click Save.
4. Click Save and Close.

The competency can be added in a requisition if the competency matches the location of the requisition

## Associating a Competency to a Job Field

A user type permission grants users access to this feature.

### Libraries > Competencies

1. Click on a competency.
2. Click Edit.
3. In the Job Fields section, specify if you want to associate the competency to all job fields or to specific job fields.  
If you associate the competency to specific job fields, click Modify, select a job field in the Job Field selector, then click Save.
4. Click Save and Close.

The competency can be added in the requisition if the competency matches the job field of the requisition

## Dissociating a Competency from a Location

A user type permission grants users access to this feature.

### **Libraries > Competencies**

1. Click on a competency.
2. Click Edit.
3. In the Associated Structure section, clear the Location check boxes.
4. Click Save and Close.

A competency which is not associated to any location remains in the Competency Library but can only be added manually to a requisition.

## Dissociating a Competency From a Job Field

A user type permission grants users access to this feature.

### **Libraries > Competencies**

1. Click on a competency.
2. Click Edit.
3. In the Associated Structure section, clear the Job Fields check boxes.
4. Click Save and Close.

A competency which is not associated to any location remains in the Competency Library but can only be added manually to a requisition.

## Adding a Competency to the Job Field or Location Structure

A user type permission grants users access to this feature.

### **Libraries > Competencies**

1. Click on the Job Field or Location tab in the left pane.
2. Click Add Competency...
3. Click Select next to the desired competency.
4. Click Done.

The user adding a competency to a requisition will be presented with a selector window containing competencies matching the Organization-Location-Job Field structure of the requisition.

## Removing a Competency from the Job Field or Location Structure

A user type permission grants users access to this feature.

### **Libraries > Competencies**

1. Click on the Job Field or Location tab in the left pane.
2. Select a competency.
3. Click Remove Competency.

By removing a competency from the Location and/or Job Field structure, the user adding a competency to a requisition will be presented with a selector window containing this competency regardless of the requisition Organization-

Location-Job Field structure. The selector window presents competencies matching the Organization-Location-Job Field structure of the requisition or any competencies that is not associated to any Organization-Location-Job Field.

## Adding a Competency to the Profile

A user type permission grants users access to this feature.

### Libraries > Competencies

1. Click on the Job Field or Location tab in the left pane.
2. Select a competency.
3. In the More Actions list, click Add to Profile.

In the Competency Library list, a checkmark appears in the In Profile column, next to the competency. The competency is available to another user creating a candidate file and to a candidate entering a profile in a career section.

## Removing a Competency from the Profile

A user type permission grants users access to this feature.

### Libraries > Competencies

1. Click on the Job Field or Location tab in the left pane.
2. Select a competency.
3. In the More Actions list, click Remove from Profile.

In the Competency Library list, a check mark no longer appears in the In Profile column, next to the competency. The competency is no longer available to another user creating a candidate file and to a candidate completing a profile in a career section.

## Adding a Competency to the Model

A user type permission grants users access to this feature.

### Libraries > Competencies

1. Click on the Job Field or Location tab in the left pane.
2. Select a competency.
3. In the More Actions list, click Add to Prescreening Model.

In the Competency Library list, a check mark appears in the In Model column, next to the competency. The competency is available to another user completing the Prescreening section of a requisition.

## Viewing a Competency in Another Language

A user type permission grants users access to this feature.

The Earth icon must be displayed next to the competency in the competencies list.

### Libraries > Competencies

1. Click on a competency.
2. Select a language from the Activated Languages list.

The competency is displayed in the selected language.

## Changing the Visibility of a Competency

A user type permission grants users access to this feature

### Libraries > Competencies

1. Click on a competency.
2. Click Edit.
3. In the Competency Properties section, select the visibility from the Visible by drop down list.
4. Click Save.

The selected competency will be visible to internal, external or all candidates according to the selected visibility.

## Evaluation Management Categories, Questions, Skills, Questionnaires Libraries

### Creating Evaluation Categories

Library Managers use the Evaluation Categories library to organize evaluation questions and questionnaires.

Evaluation categories are available in the Libraries tab of the Recruiting Center. A user type permission is required to access evaluation categories.

By default, all evaluation categories are displayed on the library. Use quick filters to refine the list by category or status (Draft, Active or Inactive). You can create new evaluation categories or modify existing ones. When you create an evaluation category, the category is created in your preferred language. Once a category is created, you can translate it. Languages for which a translation was provided are displayed in blue in the Activated Languages menu.

### Creating Evaluation Questions

Library Managers maintain an up-to-date list of evaluation questions, skills, and questionnaires that are compliant with the organization policy.

Evaluation questions are available in the Libraries tab of the Recruiting Center. A user type permission is required to access evaluation questions.

Before creating a question, look at the existing questions in the Evaluation Questions library. Use quick filters to refine the list by question (enter one or multiple words), status (Active, Inactive, Draft), and category. You can filter the list using one or several criteria. Once questions are filtered, you can sort the list by clicking on the column header. If you don't see the question you are looking for, create a new one.



## Creating Evaluation Skills

Library Managers create evaluation skills.

Skill based rating questions are available in Evaluation Management. Skills are added to evaluation questionnaires. Recruiters can evaluate candidates' skills using simple rating scales and they can compare candidates against each other and the desired skill level for the position. Charts provide users with a visual means of reviewing results and comparing responses.

Evaluation skills are available in the Libraries tab of the Recruiting Center. A user type permission is required to access evaluation skills.

Before creating a skill, look at the existing skills in the Evaluation Skills library. Use quick filters to refine the list by skill (enter one or multiple words), status (Active, Inactive, Draft), and category. You can filter the list using one or several criteria. Once skills are filtered, you can sort the list by clicking on the column header. If you don't see the skill you are looking for, create a new one.

## Creating Evaluation Questionnaires

Library Managers create evaluation questionnaires and add questions and skills.

Evaluation questionnaires are available in the Libraries tab of the Recruiting Center. A user type permission is required to access evaluation questionnaires.

When you create a questionnaire, three tabs are available:

- **Properties:** This is where you provide general information about the questionnaire.
- **Questions:** This is where you add questions to the questionnaire. You can specify which questions are required when evaluators complete questionnaires. You can add weight values to question answer. You can also remove questions, reorder questions, and hide or show question details.
- **Skill Ratings:** Includes a button to select the rating scale to apply to the questionnaire. Rating scales are created by system administrators. Once the rating scale is selected, you can define which skills are required when evaluators complete questionnaires. You can add, remove, and reorder skills (which were defined in the Evaluation Skills library). Once skills have been added, you select the desired skill level for each skill.



# 14 Tasks

## Task

A task is an action a user needs to perform regarding a requisition, a candidate file, or an offer.

Tasks are generated by the system and displayed in the Tasks channel (home page) and in the Tasks list.

### Tasks Channel

The Tasks channel may display tasks related to requisitions, candidates, offers, and *self-assigned tasks*. Clicking an hyperlink in the Tasks channel gives access to the Tasks list where users can see all tasks in one list view and use quick filters to filter the list. .

### Tasks List

The Tasks list presents task information in different *columns* and provides *quick filters*. Columns and quick filters are not configurable.

In the Tasks list, a task can only be executed by the owner of the task or their delegate. A task that can be executed is underlined and clickable. All system-generated tasks show the due date as "blank" and the priority as "normal". These fields are present to support any candidate self-assigned tasks which do have due dates and priority set.

In the Tasks list, when selecting the "I own" filter, tasks related to requisitions the user owns (as a user and user assistant) are displayed. If a system-generated task is assigned to the user, both the user and user's assistant will be able to perform the task. If a system-generated task is assigned to the user assistant, both the user assistant and user will be able to perform the task. In both cases the task will be displayed as a link.

### Available Tasks

Tasks are related to requisition files, candidates files, and offers.

Tasks Related to Requisitions	Description
To be completed	Reminds the user that a requisition still has to be completed before it can be posted. The task is generated at the creation of a requisition. The task is assigned to the recruiter assistant. If there is none, it is assigned to the recruiter.
Approve requisition	Reminds the user to approve a requisition.
Ready for sourcing	Reminds the user that a requisition is ready to be posted. The Ready for sourcing task is generated once the requisition is Approved and the completion level is Ready for sourcing.  If the requisition is approved by the Save As Open action, the Ready for sourcing task is assigned to the recruiter assistant. If there is none, it is assigned to the recruiter.

Tasks Related to Requisitions	Description
	If the requisition is approved by the Request Approval action, the Ready for sourcing task will be assigned to the user specified in the After Approval section of the Request Approval window.
Amend Approval Path	Reminds the user to perform the Amend Approval Path action for a requisition. The Amend Approval Path task is generated when an other user has performed the action Request Approval Path Amendment and selected the user as the assignee.
Sourcing strategy to be defined	Reminds the user that the Posting and Sourcing must be defined for a specific requisition.
Contribute	The Contribute task is the result of the Request Contribution action assigned to the contributor. It reminds the user that a contribution is required for a specific requisition.
To be filled	Reminds the user that a requisition has to be manually filled because it was not automatically filled for some reasons.
Complete Selection Process	Reminds the user to complete the selection process. The task appears when something is preventing the hire process. The task is assigned to the recruiter assistant. If there is none, it is assigned to the recruiter.
Extend posting	Reminds the user to extend the posting of a requisition.

Tasks Related to Candidate Files	Description
Finalize Start Date	Reminds the user to set as final the start date for the offers accepted with a tentative start date.
Duplicate Check	When a candidate applies on a career section and a duplicate check is not performed immediately, a <i>Duplicate Check</i> task is generated. The task is assigned to the recruiter assistant. If there is none, it is assigned to the recruiter.
Self-Assigned Task	A <i>self-assigned task</i> is a task users create for themselves.

Tasks Related to Offers	Description
Extend Offer	Reminds the user to extend an offer.
Approve Offer	Reminds the user to approve an offer.
Confirm Employee Presence	Reminds the user to set as Hired candidates who have accepted an offer with a non-tentative start date. The task is assigned to the recruiter assistant. If there is none, it is assigned to the recruiter.

## Rules Regarding Task Assignment

Tasks are assigned to a user or to the user's assistant according to these rules:

- When a system-generated task is created, the assignee is always the "user's assistant" (if a user assistant is identified). Otherwise, the assignee is always the user. However, the user also has access to these tasks even though they were assigned to the assistant.
- Both the user and the user's assistant can access the linked task regardless to whom (user or assistant) the task was assigned to.
- If a user assistant is identified after a system-generated task was created, the task will remain assigned to the user, but the linked task will be available to both the user and user's assistant.
- If a user assistant was assigned a task and the user assistant was later removed, the task will automatically be re-assigned to the user.

## Columns in the Tasks List

The Tasks list presents task information in different columns.

Column	Description
Attention indicator flag	Draws the user's attention to items that they own and that require viewing.
Tasks	Link that brings the user to the activity to be completed. A callout containing the task type, the assignment date and the owner is displayed when hovering the mouse on the task.
Candidate	Link to the associated candidate file. A callout containing phone numbers and email address is displayed when hovering the mouse on the candidate.
Requisition	Link to the associated requisition file. A callout with requisition ID, activated languages and features is displayed when hovering the mouse on the requisition.
Assignee	Person who will perform the task.
Comments	Callout displaying the comment.
Due date	Only relevant for self-assigned tasks.
Priority	Only relevant for self-assigned tasks.
Status	Status of the task.

## Quick Filters in the Tasks List

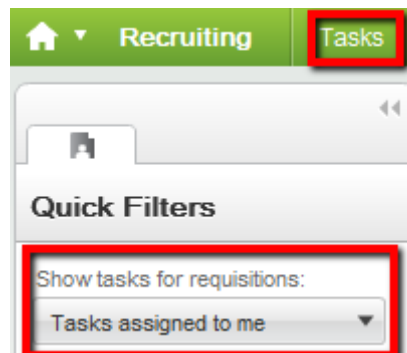
The table presents quick filters available in the Tasks list.

Quick Filter	Description
Requiring attention	Displays tasks that have the Item Requiring Attention icon. Self-assigned tasks are the only type of tasks that do not have an Item Requiring Attention icon because it is always the assignee who creates the task.
Hide completed tasks	Removes tasks that have the Completed status.
Due date	Displays tasks for which the due date matches the selected value (All, Next Week, Today, Overdue). When the option "Exclude task without due date" is selected, tasks without a due date will not appear in the list.
Task type	Displays the type of task selected. If no task type is specified, all task types appear in the list.
Related to Candidate	Displays tasks related to the selected candidate.
Related to Requisition	Displays tasks related to the selected requisition.
Related to Assignee	Displays tasks related to the selected user.

### "Tasks assigned to me" filter

The "Tasks assigned to me" filter was created to eliminate the confusion of mixing tasks that users own with tasks that users might not own, but are for requisitions they own.

The "Tasks assigned to me" filter is available in the Tasks list and Tasks channel. In the Tasks list, the filter is available in the "Show tasks for requisitions:" drop-down menu. It is the default value when accessing the Tasks list. In the Tasks channel, the "Tasks assigned to me" link brings users to the Tasks list which displays tasks assigned to them.



In the Tasks channel, when a task is clicked under Self-assigned Tasks, users are brought to the Tasks list. The "Tasks assigned to me" value in the Tasks list is selected by default no matter what the "Show the following information" filter on the home page is set to.

Show information for requisitions:

I collaborate on

Tasks		
Recruiting	▲	Total
Tasks assigned to me	8	19
All staffing tasks	0	1
<b>Self-assigned Tasks</b>		
Open	0	1
Overdue	0	1

In the Tasks channel, when a task is clicked under Requisitions, Candidates, Offers, etc., users are brought to the Tasks list and the value in the "Show tasks for requisitions:" filter is identical to the value selected in the "Show information for requisitions:" filter of the home page. Example: If "I own" is selected in the home page, then "I own" will be selected by default in the "Show tasks for requisitions:" filter of the Tasks list. If a group is selected in the "Show information for requisitions:" filter on the home page, then the same group will be selected in the Tasks list.

**Note:** The *Default Value for the Show Information Filter* setting that can be set in a configuration profile has no effect on the Tasks list view and the Tasks channel view.

## Delegating My Work Items

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

The new owner must be different from the current owner. The new owner must have the same user type permissions as the current owner. The new owner must be in all the same groups of the current owner. If the current owner is an eShare user, the new owner must also be an eShare user.

1. Click My Setup in the Resources menu located in the top right-hand corner.
2. In the General tab, click Delegate.
3. Click Search to select the user to whom you wish to delegate your work items.
4. Click the Calendar icon to open the calendar and select a starting date and an end date.
5. Click Done.

Tasks are delegated to another user for a specific period of time.

## Self-assigned Task

A self-assigned task is a task users create for themselves.

Recruiting Center users can select a candidate file, create a self-assigned task to act on at a later time, and activate a reminder to ensure the task is completed on time. The self-assigned task feature is also available while changing the step of a candidate.

For example, let say that you want to call the candidate John Doyle by the end of the week to invite him for an interview the following Monday. You need to open John Doyle candidate file, create a self-assigned task (for example "Confirm Monday's Interview") and set a reminder for Friday. On Friday morning, you will receive an email message reminding you to call John to see if he is available for an interview the following Monday. The email message contains a link that you can click in order to access all the information regarding this task. Then, in your list of tasks, click on the task regarding John Doyle to obtain details regarding this task as well as information regarding the candidate and the requisition he applied to. Look at John's phone number in his candidate file and can call him to invite him for the interview. When the task is completed (i.e., you phoned John), you simply need to indicate that the task is completed by selecting the Completed status. The Confirm Monday's Interview task is no longer displayed in the Tasks list.

A self-assigned task can also be created for several candidate files. For example, you could have a pre-filtered lists of candidates that are to be phone screened and create a single self-assigned task to perform an initial phone screen. The system automatically creates a separate self-assigned task for each candidate that was selected.

Self-assigned tasks can only be viewed by their creator. They cannot be redirected to delegates or transferred to a new user taking over.

Reminders are sent daily and users receive them in the morning (according to the appropriate time zone).

Self-assigned tasks are not reportable; reports showing self-assigned tasks cannot be created.

## Creating a Self Assigned Task

A user type permission grants users access to this feature.

1. Select a candidate file.
2. Select the Create Self Assigned Task in the More Actions list.
3. In the Task window, complete the information as required.
4. Click Save and Close.

An email message is sent to you. The message contains a link that redirects you to the information of the task. The task is listed in the Tasks list.

## Removing a Task

A user type permission grants users access to this feature.

Only self-assigned tasks can be removed.

1. In the Tasks list, hover your mouse over a task of the Tasks column.
2. Click the Remove icon.



The self-assigned task is removed from the Tasks list.

## Duplicate Check Task

The Duplicate Check task in the Recruiting Center Tasks list can be performed on any potential duplicates found within flows where the duplicate check action is activated, that is agency, referrer, or candidate flows.

When this feature is enabled, if a potential duplicate is found by the system, a Duplicate Check task is sent to the requisition's owner, that is the recruiter assistant. If no recruiter assistant was defined, it is sent to the recruiter. For a duplicate check task performed in a profile context, if a potential duplicate is found, since there is no recruiter the task is redirected to the person defined in a setting configured by the system administrator.

The task assignee runs the Duplicate Check task. Duplicates are displayed in a Quick Search Results list. The task assignee can then merge the duplicate files.

**Note:** The Duplicate Check Task uses the advanced search indexing, which may create a small delay.

## Running the Duplicate Check Task

1. Click the Tasks tab.
2. In the Quick Filters panel, under Task Type, select Duplicate Check.

## Confirm Employee Presence Task

The Confirm Employee Presence task is used to remind users to set as Hired candidates who have accepted an offer with a non-tentative start date.

The Confirm Employee Presence task is assigned to the recruiter assistant. If there is none, the task is assigned to the recruiter.

The Confirm Employee Presence task is displayed once the offer start date has been reached.

When a user confirms the employee presence at work, the following options may be displayed:

- **Yes, the employee is present:** Confirms the employee presence at work. If the Automatic Hire feature is enabled, the candidate is automatically hired.
- **Yes, the employee is present - Complete the selection process now:** Confirms the employee presence at work. In the Change Step and Status window, if the current status is a completion status, the Move action is offered. Otherwise, the Change Status is offered.
- **No, the candidate could not be present. I want to specify a new Start Date:** The Update Start Date window is displayed and the user can enter a new start date.
- **No, the candidate has reneged the offer:** The Renege Offer window is displayed and the user must enter a comment indicating why the candidate changed their mind and decided to refuse the offer.

## Confirming Employee Presence at Work

The Confirm Employee Presence task is always assigned to the recruiter assistant. If there is no recruiter assistant, the task is assigned to the recruiter.

1. Click the Tasks tab.
2. In the Quick Filters panel, under Task Type, select Confirm Employee Presence.
3. Indicate whether or not the candidate was present at work by selecting one of the option.
4. Click Done.

# 15 Correspondence

## Correspondence

### Correspondence

A correspondence is a message that can be sent to one or several recipients at a time.

When sending a correspondence, a user can create a message from scratch or use a message template defined by the system administrator. The correspondence can be sent to a *secure message center*, via email, or it can be printed in order to fax it or send it by regular mail.

Attachments can be included in a correspondence. The maximum file size of attachments is specified by the system administrator.

Correspondence can be sent to a maximum of 150 candidates at a time.

To send a correspondence, to create a message from scratch and to attach files to a correspondence, users must have the applicable user type permissions.

### Secure Message Delivery

Customers who wish to have increased control over the information sent to Career Section users via email may choose to enable the Secure Message Delivery feature. When enabled, all messages are delivered to a secure Message Center accessible from any of the customer's Career Sections. Message recipients are directed to the Message Center to retrieve their messages.

The Secure Message Delivery feature applies only to messages sent to Career Section users, that is candidates, agents, and referrers. It does not impact Recruiting Center users or messages sent with other Oracle Taleo Enterprise Edition products.

If a message is sent via email (whether it is an automated message or the sender selected to send it via email), rather than receiving the actual message via email the message recipient receives a notification of message delivery containing a deeplink. To receive a notification of message delivery, message recipients must have a valid email address on file and the notification template message must be active.

**Note:** All messages sent to a single email address will be accessible from any Secure Message Center that is linked to that email. This may cause candidates to see one another's message content, just as though they were receiving messages via a shared inbox. If this is not desired, then the Email Uniqueness setting should be changed (Configuration > [Recruiting] Settings).

To access the Message Center, the message recipient clicks the deep link in the message and enters a user name and password. If the user does not yet have an account, the user must create one prior to be able to access messages.

Alternatively, the Message Center can be directly accessed via any active Career Section by clicking the My Messages tab.

Once in the Message Center, the message recipient can read messages, delete them, and download the files attached to the messages in order to view them. Before accessing an attachment, the recipient must accept a download agreement. Messages are displayed in a print friendly format should Career Section users wish to print a message using the browser's print functionality.

When viewing a specific message, the recipient can navigate from one message to the next without returning to the list view by using the Previous or Next links. The message may also be deleted. Clicking Back returns the user to the message list.

For Career Section users who do not have an email address, the message sender can still send them messages and these users can access their messages from within the Message Center. For example, a candidate exists in the system and did not supply an email address. A recruiter will still be able to send an email message to the candidate using the Recruiting Center correspondence feature.

## The Message Center

The Message Center has the same look and feel as the Career Section; it adopts the theme and branding of the Career Section. Messages inside the Message Center retain the formatting attributes of the message template.

The Message Center language matches the language from where the Message Center was originally accessed. If the user is coming from a Career Section, the Message Center is presented in the same language as the Career Section. If coming from the deeplink contained in the notification, the Message Center is presented in the same language as the notification sent to the user. Messages inside the Message Center are in the language used to transmit the message. Help text is displayed in the right-hand side of the Message Center. Default universal help text, which can be edited via TexTool, is provided by Oracle. If desired, the text can be customized by a Career Section administrator using the Career Portal Page user-defined labels feature. This text change only affects the Message Center on that particular Career Section.

The Message Center stores messages sent within the past 6 months to a maximum of 100 messages. If more than 100 messages have been delivered, only the most recent 100 messages are accessible.

Messages that do not have a subject cannot be opened from the Message Center.

**Note:** When the Message Center is enabled, the "To", "Cc", and "Bcc" fields in the message header are not available when sending correspondence; therefore, Recruiting Center users cannot edit the message recipients. Also, Recruiting Center users cannot add additional recipients while manually sending a correspondence.

**Note:** When Recruiting Center users are resending messages from the candidate file History tab, the system will replicate the method of delivery used for the original message. If a message was sent prior to enabling the Message Center, when the user chooses to resend such a message, the system will not deliver the resent message to the Message Center, it will send the message to the original email address.

## Sending a Standard Correspondence

A user type permission grants users access to this feature.

Correspondence can be sent to a maximum of 150 candidates at a time.

1. In the Candidates list, select one or several candidate.

2. In the More Actions list, select Send Correspondence...
3. Select From template.
4. Click the Selector icon and select a template.
5. Click Next.
6. Click Send to send the message via email or Print to print it.

Depending on the option you selected, the message will be printed or sent to the selected candidates. If the message was printed, you can either fax the message to the candidates or send it via regular mail.

## Sending a Customized Correspondence

A user type permission grants users access to this feature.

A user type permission is required to attach a file to a message.

1. In the Candidates list, select one or several candidate files.
2. In the More Actions list, select Send Correspondence...
3. Select From scratch.
4. Enter information in the required fields marked with a red mark.
5. Click Next.
6. Type the message in the Message field.
7. To attach a file to the message, click Browse..., select a file, then click Attach.
8. Click Send.

## Resending a Correspondence

A user type permission grants users access to this feature.

1. In the candidate file, click on the History tab.
2. In the Details column, click on the link corresponding to the correspondence that was sent.
3. Click Resend.
4. Add a comment.
5. Click Next.
6. Click Send.

The correspondence previously sent is sent again.



# 16 Screening Services

## Screening Service

### Screening Service

An organization may choose to have external partners provide specialized screening services.

A screening services partner can supply services such as:

- candidate assessment
- background check
- tax credit eligibility
- interview guides
- interview scheduling
- validated tests to identify and measure a candidate's qualifications, motivations, abilities and eligibility

Screening services must be activated by Oracle Support before they can be used in a requisition flow. Services are sourced to the application using an external tool, and enabled by default if the service does not require any additional configuration.

Once a service is made available by Oracle Support, the service can be activated or deactivated by system administrators and made available or not to Recruiting Center users when creating a requisition.

All screening services have the same properties, however, the settings of these properties will vary according to the service. System administrators can configure the screening service that is, modify input fields, phases, etc.

The languages in which an external service is available depend on the languages used by the service providers and vendors.

Screening services are available to Recruiting Center users provided they have been granted the proper user type permission.

## Requesting a Screening Service

A screening service must be made available in the system.

A user type permission grants users access to this feature.

The candidate must be in a selection process.

1. In the Candidates list, click on the name of a candidate.
2. In the More Actions list, select Request Screening Service.
3. Select a service from the Available Service drop-down list.

4. Click Done.

The candidate will receive a request from a screening service.

## Adding a Screening Service to a Requisition

A screening service must be activated by Oracle Support.

A user type permission grants users access to this feature.

1. In the requisition file, under the Requisition tab, click Edit.
2. In the Screening section, select the desired service in the requisition.
3. Click Save and Close.

## Screening Results

Screening results such as background checks, tax credit eligibility, are displayed in the candidate file, under the Job Submission tab.

Screening information is displayed in columns as follows:

- Requester
- Request Date
- Provider Status
- Status
- Result Summary

A Details link provides details on the transaction selected. This view is configurable by the system administrator. Information on partner updates is also displayed.

A Previous Requests link gives access to the previous transactions with the same provider.

**Note:** For background checks, Recruiting Center users cannot see the data that the candidate filled in; they can only see if the candidate accepted the background check consent.

Results are automatically reused across the system, if applicable. If the results of a screening service are applicable on a different candidate submission, they will automatically be re-used on that new job submission. This means that the candidate will not have to go through the screening service if there is already active information stored on the candidate for that service. The screening results will show in the candidate file screening section of all the applications configured with that screening service automatically (no result synchronization necessary on the Partner screening service). In addition, auto-flow will automatically progress the candidate on ALL the applications that the candidate applied where the results are valid.

The History tab in the candidate file provides detailed information on each transaction as well as updates sent by partners.

In the candidate General Profile, it is possible to view the results of any screening services the candidate has completed on any of its job submissions, provided that the results are reusable across all applications.



# Taleo Assessments

## Assessments

Assessments in the workplace are used to measure the knowledge, skills, abilities and behavioral attributes related to a job or corporate culture. They can also be referred to as screening services, tests, surveys, exams, evaluations, simulations, work samples, assessment centers, interview guides, or realistic job previews. Employers use assessments to hire applicants, develop and promote employees, and collect talent intelligence on internal and external talent pools.

Professional fields related to the scientific research, development and use of workplace assessments include Industrial Organizational (I/O) Psychology and Organizational Development (OD). Also, the fair use of workplace assessments is overseen at the state and federal level or the territory, national and regional/multinational level by various government organizations, such as the U.S. Equal Employment Opportunity Commission (EEOC).

Depending on their professional credentials, authors may also be involved with the following assessment services:

- Job Analysis – determines job-related competencies to include in the assessment.
- Validation Study – determines if the assessment is a reliable and valid measure of the selected competencies and to what degree it predicts job performance.
- Adverse Impact Analysis – determines if the assessment could potentially impact protected groups or promote unfair bias.
- Business Impact Study – determines the cost and time savings, or return on investment, from using a validated assessment over a period of time.

## Using Taleo Assessment Results to Evaluate Candidates

Following best practices when using assessment results to evaluate a candidate will result in high quality hires.

The assessment summary is available in the candidate submission, in the Screening section of the Job Submission tab.

By default, candidates are put in three bands: red, yellow, and green. The band names may vary by company preference.

The first step in evaluating a candidate is to focus on the global band. Candidates with green global results should be reviewed first. Yellow candidates can be reviewed. We highly recommend against considering candidates that have a global band of red.

The next step is to review the candidate's individual dimension results. Candidates with more green dimension bands should be considered before candidates with fewer green dimension bands. For example, a candidate with 6 green dimension bands is a better candidate to proceed to the interview than a candidate with 4 green dimension bands.

When planning the interview, the hiring manager should review the dimension results from the assessment. Any yellow or red dimension areas should receive more focus during the interview. Using behavioral-based interview questions is the best technique to evaluate a candidates competence in the dimension topic areas. An automatically generated interview guide is an optional feature that can be included with assessment results.

A final evaluation is the determination of fit between the role being filled and the candidate's dimension results from the assessment. A hiring manager or recruiter should have a good idea of the specific competency requirements for

the specific position being filled. This knowledge should be used to compare a candidate's assessment results to the specific competency requirements of the given role.

## Assessment Results Fields in the Candidate Submission

Field	Description
Requester	Name of the person requesting the screening service. In the case of assessments, it is usually the name of the candidate since the request is made during the application through the Career Section.
Request Date	Date when the assessment was requested.
Provider Status	Status of the request on the partner's side. The field can be empty and values displayed may differ for each partner.
Status	Status of the request.
Result Summary	In the partner certification, it is possible to mark one field as the Result Summary field. Values come from the assessment partner. Values displayed may differ for each partner.
Details	The Details link opens the Details view which provides an overview of the dimensions assessed and the candidate's dimension bands. To go back to the summary view, click Back.
Previous Requests	The Previous Requests link gives access to the previous transactions with the same provider.
Results Expiration Date	Validity of the results. When the date is passed, the results expire.
Last Activity Date	Date when last activity took place.
Reference Number (Internal)	ID for the request.
Reference Number (External)	Partner ID for the request.
Online Assessment Solution	The input parameter specified on the corresponding requisition.
Results	This section presents assessment result fields coming back from the partner.
Provider Detailed Results	The Provider Detailed Results link opens a window to navigate in the partner's site where further details are provided regarding the assessment results.

## Assessment Status in the Candidate Submission

Status	Description
Waiting For Provider Response	When a candidate attempts to take an assessment by clicking a link a request is sent to the assessment provider. Once the response is received the status will change to Unable to Process, Service Requested, or Sent to Candidate.
Unable to Process	The connection between the request and acknowledgment of assessment request was not successful. Contact Oracle Support.
Service Requested	The candidate has clicked a link to take the assessment.
Sent to Candidate	The system has fulfilled a request to send a link to the assessment to the candidate via email.
In progress	-

Status	Description
Acknowledged by Provider	The assessment has been completed. If the assessment was completed by the candidate a score is now available. If a score is not available the candidate completed the assessment by timing out.
Partner Didn't Respond within Set Time	The <i>Delay to wait before timing out a request (in hours)</i> time limit has been met.
Candidate Didn't answer email within Set Time	The <i>Candidate must answer email within (in hours)</i> time limit has been met.
Declined By Candidate	The candidate declined to take the assessment.

## Assessment Versions

Assessments can have multiple versions.

The questions on the assessment are the same for all versions but can have different properties and scoring methods. Assessment versions affect Assessment Retakes and Scoring.

## Bands

Bands are score divisions.

When a candidate takes an assessment, dimension scores and a global score are calculated for the version of the assessment. The candidate's dimension scores and global scores fall within a range. This range is referred to as a band in Assessment.

Band names may vary by organization. By default, assessments are designed to separate candidate assessment score ranges into three groups:

- Red candidates have a poor to below average score.
- Yellow candidates have a score that is slightly below the average.
- Green candidates have an above average to exceptional score. The top 40% of applicants receive this global band. Candidates best suited for hiring are usually located in this band.

ABC Corporation has an assessment measuring three dimensions: interpersonal skills, honesty, and loyalty. The cashier version of the assessment has the following properties: Honesty has a -20 to 30 point range and is weighted at 40% importance; Loyalty has a -10 to 10 point range and is weighted at 10%; and interpersonal skills has a -40 to 30 point range and is weighted at 50%. The global range is -29 to 28.

Each dimension score has three bands: red, yellow, and green. The ranges of the bands must include all possible scores.

The breakdown of the bands for the honesty dimension is:

- Red has a range of -20 to -5 points.
- Yellow has a range of -5.1 to 15 points.
- Green has a range of 15.1 to 30 points.

## Interview Guides

An interview guide is an optional screening tool that provides recruiters and hiring manager with specific candidate assessment answers and interview questions that relate to the candidate's assessment results.

When an assessment version is created, the assessment author can choose to activate interview guide generation. If this option is enabled the system generates an interview guide for employees who take that version of the assessment.

Enabling Interview Guide generation is determined when assigning assessment version properties.

## Interview Guide Content

Name	Description
<b>Applicant Information</b>	
Job name	Auto-filled with the job name from Recruiting.
Applicant name	Auto-filled with the applicant name from Recruiting.
Application date	Auto-filled with the application date from Recruiting.
Assessment completed	Auto-filled with the date the assessment was completed from Recruiting.
Prescreening result	Auto-filled with prescreening results from Recruiting.
<b>Overall Match to Job</b>	
Dimension Text	Assessment version specific text to describe the overall the assessment. This text is not labeled dimension text.
Pass	If a global band has been marked as failed and a candidate fell into that band this value is no. If the candidate's global band does not have a failed marker this value is yes.
Exceptional	If a global band has been marked as exceptional and a candidate falls into that band this value is yes.
Global Band	The candidate's global band based on the global score.
Global Interpretation	Description of how to interpret the global band result.
Results Summary Table	Lists the dimensions measured and the candidate's dimension band.
Interview Guideline	Instructions to the interviewer.
Interview Guide Questions	Default interview questions asked to all candidates.
<b>Dimension Specific Information</b>	
Impact	A rating scale a hiring manager can use to note personal perception of the candidate.
Job Fit Personality rating	A rating scale a hiring manager can use to note personal perception of the candidate.
Dimension description	Information on the dimension that was measured.
Interpretation for	Information on how to interpret the candidate's dimension band.
Interview Questions for the Dimension	Two types of interview questions make up this portion of the interview guide: interview questions configured to show up on all assessments with the dimension, and interview questions configured to show up based on the dimension band the candidate receives.
Assessment Questions	Assessment question and answer combinations for answers marked to validate. These questions and answers only show up on a candidate's interview guide if the candidate has selected the answer marked for validation.

# 17 Report

## Daily Recruiting Report

The daily recruiting report is an email message that contains statistics on one or more requisitions.

The daily recruiting report is configured in the requisition Reports tab. Recruiting Center users can indicate that a requisition will be included in the report and select the people who will receive the email message with statistics on the requisition.

Statistics available in the daily recruiting report are:

- Global statistics: new applications, candidates in the database and the number of requisitions in the various stages of the hiring cycle.
- Statistics on requisitions assigned to you (as the recruiter or owner): number of new candidates and number of posted requisitions.
- Details on requisitions for which you are a recipient or interested team member: requisition title and status, number of candidates by status, and opening and closing posting dates.

## Modifying the Daily Recruiting Report

A user type permission grants users access to this feature.

1. In the requisition file, click the Reports tab.
2. Click Modify Report.
3. Select the option "This requisition will be included in the daily recruiting report."
4. Select the recipients of the report.
5. Click Done.

In the requisition Reports tab, there is an indication that the requisition will be included in the report. The name of the recipients is also displayed.

## Embedded Reporting

Recruiting customers can use Oracle Business Intelligence (OBI) Publisher technology to create reports on all their recruiting data. End-users are able to import, customize and run reports directly in the Recruiting Center.

In the Recruiting Center, the navigation bar displays a **Reports** link to users who have been granted permissions to access and generate reports. The Reports link gives access to:

- Generated Reports
- Scheduled Reports

## Generated Reports

The Generated Reports page, available under the Reports link, displays a list of reports previously generated by the user as well as reports that can be generated by the user.

The Generated Reports page is divided into two tabs:

- My Reports
- Report List

The **My Reports** tab displays a list of reports previously generated by you. For each report, the report name, request date and status of the report are displayed. You can see the generated report by clicking on its name. The drop-down menu provides access to different actions on the report:

- View: Download the generated report in the selected output format. This is similar to clicking the name of the report.
- Create: Schedule reports to be run at a set schedule.
- Export XML: Export reports in xml format.
- Refresh Data: Run reports using the most recent data in the system.
- Delete: Delete generated reports. It does not delete the actual report in the Report List.

The **Report List** tab presents all the reports that can be generated by you. Reports are grouped by categories. Reports that are not tied to a category are grouped at the bottom of the list under an "Unspecified Category" group.

You can use the search tool to search for reports using the report name.

Depending on how the report was configured, different parameters can be selected under Customization. You can also select the output format of the report (PDF, XLSX, RTF, HTML, EXCEL, XML, CSV).

In the Output section, you can select the output format of the report (PDF, XLSX, RTF, HTML, EXCEL, XML, CSV). You can also select the Zip the Report option to have the report available as a zip file.

When a report is set to run or is scheduled to be run, you can specify using the Send Notification option that a notification will be sent for that report and you can choose who will receive the notification. If you do not select a recipient, the notification will only be sent to you. You can specify external recipients (users who do not have access to Recruiting) by entering their email addresses separated by a semi-colon. A notification is sent to recipients when the report runs successfully.

- If the size of the report file is smaller than or equal to the allowed attached file size, you and the recipients will receive the notification with the report attached.
- If the size of the report file is greater than 10 Mb, you and the recipients will receive the notification with a link to the report.
- If the report generation fails, you will receive a notification with an error message.

External recipients (users with no access to Recruiting) will not be able to act on notifications because the link will not grant them access to Recruiting.

When you are running a report, you may be prompted to select a parameter to filter the report. A search tool is available so you can search large list of elements. When you are running a report that has a parameter based on a list of values populated by a physical or logical query and with a maximum of 100 items, you can click the Search icon and access a new search window. The search window may provide a single selection or multiple selections. For a single selection, the

search results are displayed in the Available pane where only one value can be highlighted for selection. If the search returns no results, a "No data found" message is displayed. For multiple selections, the search results are displayed in the Available pane where one or several values can be selected. In both the Available pane and Selected pane, it is possible to select several values: CTRL+click to select multiple nonadjacent values or SHIFT+click to select multiple adjacent values. Once values are selected, you can move elements using the Add, Add All, Remove, Remove All arrows.

Once a report has been run, it is available in the My Reports list and its status is Ready.

## Scheduling Reports

Report users can schedule reports to be run at a set schedule.

After a report has run and its status is Ready, you can create a schedule to run the report at a specific frequency. A Create action in the My Reports window is available. A gray clock icon next to the report name indicates the reports that are scheduled to run.

When scheduling a report, you define the following properties:

- Name: Name of the scheduled report.
- Description: Description of the scheduled report.
- Notification: A notification can be sent once the scheduled report is generated.
- Recurrence: The frequency at which the report will be run. Options are:
  - Hourly: The report is run every hour on the hour.
  - Daily: You can choose the days and time when the report will run.
  - Monthly: You can choose the day of the month and time when the report will run. You also have the option to choose the last day of the month. Only one day can be selected for a monthly execution.
- Start Time: Time when the report will start running. Available only for Daily and Monthly reports. You must specify a time zone. By default, the time zone set for the zone is used (Configuration > General Configuration > Settings > Time Zone).
- Expiration Date: Available only when a scheduled report is being edited. By default, the expiration date is set to three months from the creation date.
- Status: A scheduled job can be active or inactive.

You can view the list of reports that have been scheduled to run in the Scheduled Report List. In the Status column, the green icon indicates that the scheduled report is active while the red icon indicates that the scheduled report is inactive. When a scheduled report is expired, a gray clock icon is displayed next to the report name. When a scheduled report is set to expire in the next 14 days, a red clock icon is displayed.

In the Scheduled Report List, you can perform the following actions:

- Edit a scheduled report.
- Duplicate a scheduled report.
- Delete a scheduled report.
- Activate a scheduled report (note that a report inactivated by the system administrator cannot be activated).
- Deactivate a scheduled report.
- Renew a scheduled report (only available if the scheduled job is expired or will expire in the next two weeks).

